DLN: 93493132025796

OMB No 1545-0047

Form **990** 

Department of the Treasury Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private

▶ Do not enter social security numbers on this form as it may be made public

**Return of Organization Exempt From Income Tax** 

▶ Information about Form 990 and its instructions is at <a href="www.IRS.gov/form990">www.IRS.gov/form990</a>

Open to Public

A For	the 20:		endar year, or tax year beginnin	g 07-01-2014 , and ending 06-30-20	)15			
	ck if appli ress chan	icable	C Name of organization THE SCHOTT FDTN FOR PUBLIC ED	UCATION		<b>D Employe</b> 04-345	er identification 7065	n number
Nam	ne change	9	Doing business as			-		
Initia	al return		N 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		, .	E Telephone	e number	
_	rn/termın		675 MASSACHUSETTS AVENUE 8TH		suite	(617)8	76-7700	
_	ended retu lication pe		City or town, state or province, cou CAMBRIDGE, MA 02139	ntry, and ZIP or foreign postal code		<b>G</b> Gross rec	eipts \$ 5,109,91	15
		ľ	F Name and address of pri	ncıpal officer	<b>H(a)</b> Is th	■ nis a group re	eturn for	
			JOHN H JACKSON 675 MASSACHUSETTS AV	ENUE 8TH FLOOR	subo	ordinates?	Γ	Yes 🔽 No
			CAMBRIDGE, MA 02139			all subordina	ates [	Yes No
· Tax	-exempt	status	▼ 501(c)(3)	(insert no ) 4947(a)(1) or 527	_	uded? Io." attach a	list (see ins	structions)
We	bsite: I	<b>-</b> \\/\\/¹	W SCHOTTFOUNDATION OR		<del>-</del>	up exemptio		,
					1		1	
Par		Sumi	Corporation Trust Association	on   Other <b>F</b>	L Year of f	ormation 1999	M State of	legal domicile MA
Activities & Governance	A E E D	BROAE UCAT	D-BASED AND REPRESENTAT ION, AND (3) TO ENGAGE IN	L PURPOSES UNDER CODE SECTI IVE MOVEMENT TO ACHIEVE FUL ANY AND ALL OTHER LAWFUL ACT AS SPECIFICALLY RESTRICTED E	LY RESOURCE FIVITIES INC	D, QUALITY IDENTAL TO	Y PRE K-12 I D AND IN PU	PUBLIC JRSUIT OF
3	<b>2</b> Ch	eck th	ıs box ┡─ ıf the organızatıon dı	scontinued its operations or dispose	d of more than	25% of its n	et assets	
တို့ မြ	3 N		.f.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	one hady (Dark)/T line 1-)		ı	a	0
				ning body (Part VI, line 1a) of the governing body (Part VI, line 1		<b>⊢</b>	3 4	9
蓬				calendar year 2014 (Part V, line 2a)		`. `.	5	13
	<b>6</b> To	tal nun	nber of volunteers (estimate if r	necessary)		[	6	9
				art VIII, column (C), line 12			7a	20,000
	<b>b</b> Ne	t unrel	ated business taxable income i	rom Form 990-T, line 34		· ·   or Year	7b	ent Year
	8 (	Contrib	outions and grants (Part VIII. I	ne 1 h)		3,275,47	_	4,707,372
를				ine 2g)		, ,	0	0
Rayenue				n (A), lines 3, 4, and 7d)		450,66	7	382,543
_				lines 5, 6d, 8c, 9c, 10c, and 11e)		20,00	00	20,000
				(must equal Part VIII, column (A), l	ine	3,746,14	4	5,109,915
				IX, column (A), lines 1-3)		1,533,54	0	2,190,890
				(X, column (A), line 4)			0	0
		Salarie 5–10)	s, other compensation, employ	ee benefits (Part IX, column (A), line:	5	1,469,02	:1	1,504,465
e e	<b>16a</b> F	rofes	sional fundraising fees (Part IX	column (A), line 11e)	•		0	0
Ехрепзея	b 1	Total fur	ndraısıng expenses (Part IX, column (D	9), line 25) • <del>56,478</del>				
_				lines 11a-11d, 11f-24e)		881,38	_	799,998
- 1				st equal Part IX, column (A), line 25		3,883,94	+	4,495,353
Net Assets or Fund Balances	<b>19</b> F	Kevenu	ie iess expenses Subtract line	18 from line 12	Beginnir	-137,79 ng of Current Year		614,562 of Year
SS et	20 7	Γotal a	ssets (Part X, line 16)		. 🖯	8,892,44	.5	9,862,341
8 1 년 1 년						762,41		1,400,719
				line 21 from line 20		8,130,03	1	8,461,622
ny kn	penaltı owledge	es of pe and be any kn	ellef, it is true, correct, and cor owledge	amined this return, including accomp nplete Declaration of preparer (other	than officer) is			
Here			H JACKSON PRESIDENT AND CEO					
			or print name and title	Preparer's signature	Date Ch	1-	TIN	
Paid			nnt/Type preparer's name OSEPH M GISO	JOSEPH M GISO	2016-05-02 sel	f-employed F	00030126	
	parer	Fı	rm's name ► CBIZ TOFIAS		Fır	m's EIN 🟲 26-3	3753134	
· ~ L	Only	l <sub>E</sub> ,	rm's address ► 500 BOYLSTON STREE	г	l ph	one no (617)	761 0600	

BOSTON, MA 02116

May the IRS discuss this return with the preparer shown above? (see instructions)

✓ Yes ☐ No

4e Total program service expenses ►

3,498,750

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	1	Yes	
2	Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? $^{*}$	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part $I^{\bullet}$	3		No
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	4	Yes	
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>	5		No
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space,			No
	the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	7		100
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	8		No
9	Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part $IV^{\square}$	9		No
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part $\sqrt[6]{2}$	10	Yes	
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable			
а	Did the organization report an amount for land, buildings, and equipment in Part X, line 10?  If "Yes," complete Schedule D, Part VI	11a	Yes	
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII	11b		No
С	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII	11c		No
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX	11d		No
е	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e		No
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	11f	Yes	
12a	Did the organization obtain separate, independent audited financial statements for the tax year?  If "Yes," complete Schedule D, Parts XI and XII	12a	Yes	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional	12b		No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule $E$	13		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		No
	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV	14b		No
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV	15		No
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If</i> "Yes," complete Schedule F, Parts III and IV	16		No
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and $11e^{\gamma}$ If "Yes," complete Schedule G, Part I (see instructions)	17		No
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	18		No
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19		No
20a	Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a		No
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		

Par	t IV Checklist of Required Schedules (continued)			
21	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21	Yes	
22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22		No
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part $I$	25a		No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	25b		No
26	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III	27		No
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
а	A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part			
	<i>IV</i>	28a		Νo
b	A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV	28b		No
С	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV	28c		No
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule $M$	29		Νo
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II	32		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301 7701-2 and 301 7701-3? If "Yes," complete Schedule R, Part I	33		No
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1	34	Yes	
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	Yes	
Ь	If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35b	Yes	
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2	36		No
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?		Yes	_

### Part V Statements Regarding Other IRS Filings and Tax Compliance

	Check if Schedule O contains a response or note to any line in this Part V			<u>.</u>
1_	Enter the number reported in Box 3 of Form 1096 Enter -0 - if not applicable   1a   32		Yes	No
	Enter the number reported in Box 3 of Form 1096 Enter -0 - if not applicable 1a 32  Enter the number of Forms W-2G included in line 1a Enter -0 - if not applicable 1b 0	4		
	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable		<b>V</b> = :	
2a	gaming (gambling) winnings to prize winners?	1c	Yes	
	by this return	<u> </u>		
D	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?  Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	2b	Yes	
За	Did the organization have unrelated business gross income of \$1,000 or more during the year?	За	Yes	
	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O	3b	Yes	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a		No
b	If "Yes," enter the name of the foreign country •			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		 No
	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		No
С	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?	5c		
	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b		
7	Organizations that may receive deductible contributions under section 170(c).	7-		NI =
	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a 		N o
	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to			
	file Form 8282?	7c		No
d	If "Yes," indicate the number of Forms 8282 filed during the year	-		
е	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h		
8	Sponsoring organizations maintaining donor advised funds.  Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8		_
9a	Did the sponsoring organization make any taxable distributions under section 4966?	9a		
	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b		
10	Section 501(c)(7) organizations. Enter			
	Initiation fees and capital contributions included on Part VIII, line 12 10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities			
11	Section 501(c)(12) organizations. Enter			
a	Gross income from members or shareholders	-		
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them )			
	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year			
13	Section 501(c)(29) qualified nonprofit health insurance issuers.			
а	Is the organization licensed to issue qualified health plans in more than one state?  Note. See the instructions for additional information the organization must report on Schedule O	13a		
Ь	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans			
c	Enter the amount of reserves on hand	<u> </u>		
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a		Νo
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14b		

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI	.▽

Se	ection A. Governing Body and Management			
			Yes	No
<b>1</b> a	Enter the number of voting members of the governing body at the end of the tax year			
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O			
b	Enter the number of voting members included in line 1a, above, who are independent			
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	Yes	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?.	3		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		No
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		No
6	Did the organization have members or stockholders?	6		No
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		No
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		No
8				
а	The governing body?	8a	Yes	
b	Each committee with authority to act on behalf of the governing body?	8b	Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9		No
Se	ection B. Policies (This Section B requests information about policies not required by the Internal R	eveni	ue Cod	e.)
Se	ection B. Policies (This Section B requests information about policies not required by the Internal R	eveni	ue Cod Yes	e.) No
	Did the organization have local chapters, branches, or affiliates?	evenu		
10a				No
10a b	Did the organization have local chapters, branches, or affiliates?	10a		No
10a b 11a	Did the organization have local chapters, branches, or affiliates?	10a 10b	Yes	No
10a b 11a b	Did the organization have local chapters, branches, or affiliates?	10a 10b	Yes	No
10a b 11a b 12a	Did the organization have local chapters, branches, or affiliates?	10a 10b 11a	Yes	No
10a b 11a b 12a b	Did the organization have local chapters, branches, or affiliates?	10a 10b 11a	Yes Yes	No
10a b 11a b 12a b	Did the organization have local chapters, branches, or affiliates?	10a 10b 11a 12a 12b	Yes Yes Yes	No
10a b 11a b 12a b	Did the organization have local chapters, branches, or affiliates?  If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?  Describe in Schedule O the process, if any, used by the organization to review this Form 990  Did the organization have a written conflict of interest policy? If "No," go to line 13  Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?  Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	10a 10b 11a 12a 12b	Yes Yes Yes Yes	No
10a b 11a b 12a b c	Did the organization have local chapters, branches, or affiliates?	10a 10b 11a 12a 12b 12c 13	Yes Yes Yes Yes Yes	No
10a b 11a b 12a b c 13 14	Did the organization have local chapters, branches, or affiliates?	10a 10b 11a 12a 12b 12c 13	Yes Yes Yes Yes Yes	No
10a b 11a b 12a b c 13 14 15	Did the organization have local chapters, branches, or affiliates?	10a 10b 11a 12a 12b 12c 13	Yes Yes Yes Yes Yes Yes Yes	No
10a b 11a b 12a b c 13 14 15	Did the organization have local chapters, branches, or affiliates?	10a 10b 11a 12a 12b 12c 13 14	Yes Yes Yes Yes Yes Yes Yes	No
10a b 11a b 12a b c 13 14 15	Did the organization have local chapters, branches, or affiliates?	10a 10b 11a 12a 12b 12c 13 14	Yes Yes Yes Yes Yes Yes Yes	No No
10a b 11a b 12a b c 13 14 15 a b	Did the organization have local chapters, branches, or affiliates?  If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?  Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?  Describe in Schedule O the process, if any, used by the organization to review this Form 990  Did the organization have a written conflict of interest policy? If "No," go to line 13  Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?  Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done  Did the organization have a written whistleblower policy?  Did the organization have a written document retention and destruction policy?  Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?  The organization's CEO, Executive Director, or top management official	10a 10b 11a 12a 12b 12c 13 14	Yes Yes Yes Yes Yes Yes Yes	No
10a b 11a b 12a b c 13 14 15 a b	Did the organization have local chapters, branches, or affiliates?	10a 10b 11a 12a 12b 12c 13 14	Yes Yes Yes Yes Yes Yes Yes	No No

#### Section C. Disclosure

- 17 List the States with which a copy of this Form 990 is required to be filed►MA , NY
- Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c) (3)s only) available for public inspection. Indicate how you made these available. Check all that apply
  - Own website Another's website Vupon request Other (explain in Schedule O)
- 19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year
- 20 State the name, address, and telephone number of the person who possesses the organization's books and records
  ►HEIDI BROOKS

### Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

#### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation Enter -0- in columns (D), (E), and (F) if no compensation was paid
  - List all of the organization's current key employees, if any See instructions for definition of "key employee"
- ◆ List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's former directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

List persons in the following order individual trustees or directors, institutional trustees, officers, key employees, highest compensated employees, and former such persons

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

(A) Name and Title	(B) A verage hours per week (list any hours for related organizations below dotted line)	more pers	than on is	one bot	not box h ar or/tr	c , office Highest compensated	ess er	(D) Reportable compensation from the organization (W- 2/1099- MISC)	(E) Reportable compensation from related organizations (W- 2/1099- MISC)	(F) Estimated amount of other compensation from the organization and related organizations
(1) GREG JOBIN-LEEDS	1 00	х		Х				0	0	0
CO-CHAIR	0 00									
(2) BAISHALI RINKU SEN CO-CHAIR	1 00	х		Х				0	0	0
(3) MICHELLE COFFEY	1 00							_		
CLERK	0 00	X		Х				0	0	0
(4) MARIA JOBIN-LEEDS	1 00									
TREASURER	1 00	Х		Х				0	0	0
(5) MAISIE CHIN	1 00									
BOARD DIRECTOR	0 00	Х						0	0	0
(6) ANDREW GILLUM	1 00	.,								
BOARD DIRECTOR	1 00	Х						0	0	0
(7) JACKIE JENKINS-SCOTT	1 00							_	_	_
BOARD DIRECTOR	0 00	X						0	0	0
(8) LILO LEEDS	1 00									
BOARD DIRECTOR	0 00	Х						0	0	0
(9) ALVIN LOUIS STARKS	1 00									
BOARD DIRECTOR	0 00	X						0	0	0
(10) ANTONIA DARDER	1 00									
BOARD DIRECTOR	0 00	Х						0	0	0
(11) GERARD LEEDS	1 00									-
BOARD DIRECTOR	0 00	X						0	0	0
(12) DEBORAH LABELLE	1 00									
BOARD DIRECTOR	0 00	X						0	0	0
(13) JOHN H JACKSON	40 00							225 ===	_	
PRESIDENT & CEO	1 00			Х				365,732	0	45,726
(14) CASSIE SCHWERNER	40 00				ι,,			474 454	_	12.65
SENIOR VP OF PROGRAMS	0 00				Х			174,486	0	42,984

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and Title	(B) A verage hours per week (list any hours	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						( <b>D)</b> Reportable compensation from the organization (W-	(E) Reportable compensation from related organizations (W-	(F) Estimated amount of other compensation from the
	for related organizations below dotted line)	Individual trustée or director	Institutional Trustee	Officei	Key employee	Highest compensated employee	Former	2/1099-MISC)	2/1099-MISC)	organization and related organizations

1b	Sub-Total	١			
c	Total from continuation sheets to Part VII, Section A	-			
d	Total (add lines 1b and 1c)	•	540,218	0	88,710

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization ►2

			Yes	No	
3	Did the organization list any <b>former</b> officer, director or trustee, key employee, or highest compensated employee				
	on line 1a? If "Yes," complete Schedule J for such individual	3		Νo	
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such</i>				
	ındıvıdual	4	Yes		
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person	5		No	

#### Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization Report compensation for the calendar year ending with or within the organization's tax year

(A)	(B)	(C)				
Name and business address	Description of services	Compensation				
Takala sankara Cardana da karantara kara Karahada a kaka akharak da karan laka da kara Naka masa andara matkara						

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ►0

Form 99						Page <b>S</b>
Part V	/111	Statement of Revenue Check if Schedule O contains a response or note to any lir	ne in this Part VIII			
		The contract of contains a response of note to any in	(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
s	1a	Federated campaigns 1a				
Contributions, Gifts, Grants and Other Similar Amounts	ь	Membership dues 1b				
9 E	c	Fundraising events 1c				
ĒŠ.	d	Related organizations 1d				
Ē. Ēa						
ns, Sirr	e					
Contributions, Gifts, Grants and Other Similar Amounts	f	All other contributions, gifts, grants, and similar amounts not included above 4,707,372				
를 돌	g	Noncash contributions included in lines 1a-1f \$	į			
ng	h	Total. Add lines 1a-1f	4,707,372			
<u> </u>	ļ	Business Code				
E E	2a	Business Code				
e Ke	Ь					
Program Serwce Revenue	c					
rwc	d					
જુ	e					
<u>ra</u>	f	All other program service revenue				
နို		Tabel Addings 2s 26				
	g 3	Total. Add lines 2a-2f				
		and other similar amounts)	182,311			182,31
	4	Income from investment of tax-exempt bond proceeds				
	5	Royalties				
		(1) Real (11) Personal Gross rents				
	6a b	Less rental				
	c	expenses Rental income				
		or (loss)				
	d	Net rental income or (loss)				
	7a	(1) Securities (11) Other Gross amount				
	'-	from sales of 200,232 assets other				
	b	than inventory Less cost or				
	"	other basis and sales expenses				
	c	Gain or (loss) 200,232				
	d	Net gain or (loss)	200,232			200,232
4.	8a	Gross income from fundraising				
Other Revenue		events (not including  \$				
<b>⊕</b> >		of contributions reported on line 1c)				
č		See Part IV, line 18 a				
	ь	Less direct expenses b				
δ	С	Net income or (loss) from fundraising events				
	9a	Gross income from gaming activities See Part IV, line 19				
		a				
	ь	Less direct expenses b				
	1	Net income or (loss) from gaming activities				
	10a	Gross sales of inventory, less returns and allowances .				
		returns and allowances .				
	ь	Less cost of goods sold b				
	1	Net income or (loss) from sales of inventory				
		Miscellaneous Revenue Business Code				
	11a	MANAGEMENT FEE-RELATED 561000	20,000		20,000	
	ь					
	С					
	d	All other revenue				
	е	Total. Add lines 11a-11d ▶	20,000			
	12	Total revenue. See Instructions	5,109,915	o	20,000	382,543

### Part IX Statement of Functional Expenses

Section $501(c)(3)$ and $501(c)(4)$ organizations must complete all columns. All other organizations must complete colu
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7b, 8b, 1 2 3	Check if Schedule O contains a response or note to any line in this t include amounts reported on lines 6b, , 9b, and 10b of Part VIII.  Grants and other assistance to domestic organizations and	(A) Total expenses	(B) Program service	(C)	<u> </u> (D)
7b, 8b, 1 2 3	, 9b, and 10b of Part VIII.				
2	Grants and other assistance to domestic organizations and		expenses	Management and general expenses	Fundraising expenses
3	domestic governments See Part IV, line 21	2,190,890	2,190,890		
	Grants and other assistance to domestic individuals See Part IV, line 22				
_	Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
	Compensation of current officers, directors, trustees, and key employees	786,319	467,173	305,933	13,213
	Compensation not included above, to disqualified persons (as defined under section $4958(f)(1)$ ) and persons described in section $4958(c)(3)(B)$				
7	Other salaries and wages	458,602	257,734	200,277	591
	Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	75,196	45,155	29,153	888
9	Other employee benefits	107,667	38,289	69,026	352
10	Payroll taxes	76,681	42,865	33,154	662
	Fees for services (non-employees)				
а	Management	9,950	75	9,875	
ь	Legal	5,654	202	5,415	37
С	Accounting	66,930		66,930	
	Lobbying				
	Professional fundraising services See Part IV, line 17				
	Investment management fees	38,707		38,707	
g	Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	238,167	202,978	7,181	28,008
	Advertising and promotion	552	552	,	·
	Office expenses	32,887	10,770	20,504	1,613
	Information technology	,	,	,	,
	Royalties				
	Occupancy				
	Travel	127,265	93,967	29,144	4,154
18	Payments of travel or entertainment expenses for any federal, state, or local public officials	127,203	33,307	23,144	7,137
	Conferences, conventions, and meetings	13,458	13,070	287	101
	Interest				
	Payments to affiliates				
	Depreciation, depletion, and amortization	11,118	5,334	5,756	28
	Insurance	11,448	369	11,079	
24	Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)				
	RENT & UTILITIES	172,674	87,193	85,070	411
ь	TELEPHONE	30,454	20,820	9,539	95
c	PRINTING & PUBLICATIONS	13,837	13,457	380	
d	SOFTWARE FEE/MAINTENANC	10,022	192	3,526	6,304
e	All other expenses	16,875	7,665	9,189	21
25	Total functional expenses. Add lines 1 through 24e	4,495,353	3,498,750	940,125	56,478
26	Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ► ☐ if following SOP 98-2 (ASC 958-720)				· ·

Part X Balance Sheet

		Check if Schedule O contains a response or note to any line in this Part X			· · · · <u>· · · · · · · · · · · · · · · </u>
			(A) Beginning of year		(B) End of year
	1	Cash-non-interest-bearing	586,741	1	339,764
Assets	2	Savings and temporary cash investments	611,898	2	2,273,150
	3	Pledges and grants receivable, net	683,382	3	177,250
	4	Accounts receivable, net	55,870	4	27,312
	5	Loans and other receivables from current and former officers, directors, trustees, keeployees, and highest compensated employees. Complete Part II of Schedule L	у	5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employee and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L	rs	6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges	22,836	9	25,329
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D  138,8	72		·
	Ь	Less accumulated depreciation 10b 88,7	27 35,357	10c	50,145
	11	Investments—publicly traded securities	6,859,481	11	6,937,057
	12	Investments—other securities See Part IV, line 11		12	
	13	Investments—program-related See Part IV, line 11		13	
	14	Intangible assets		14	
	15	Other assets See Part IV, line 11	36,880	15	32,334
	16	Total assets. Add lines 1 through 15 (must equal line 34)	8,892,445	16	9,862,341
	17	Accounts payable and accrued expenses	280,164	17	202,719
	18	Grants payable	482,250	_	1,198,000
	19	Deferred revenue	,	19	
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability Complete Part IV of Schedule D		21	
lities	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified			
Liabili		persons Complete Part II of Schedule L		22	
Ï	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable to unrelated third parties		24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule			
		D		25	
	26	Total liabilities. Add lines 17 through 25	762,414	26	1,400,719
у Ф		Organizations that follow SFAS 117 (ASC 958), check here ▶ 🔽 and complete lines 27 through 29, and lines 33 and 34.			
<u> </u>	27	Unrestricted net assets	1,441,207	27	1,618,739
n n	28	Temporarily restricted net assets	6,688,824	28	6,842,883
2	29	Permanently restricted net assets		29	
or Fund Balance		Organizations that do not follow SFAS 117 (ASC 958), check here ► ☐ and complete lines 30 through 34.			
2	30	Capital stock or trust principal, or current funds		30	
Sets	31	Paid-in or capital surplus, or land, building or equipment fund		31	
ž.	32	Retained earnings, endowment, accumulated income, or other funds		32	
ξ	33	Total net assets or fund balances	8,130,031	33	8,461,622
_	34	Total liabilities and net assets/fund balances	8,892,445	34	9,862,341

Par	Reconcilliation of Net Assets Check if Schedule O contains a response or note to any line in this Part XI				
1	Total revenue (must equal Part VIII, column (A), line 12)	1		5,1	109,915
2	Total expenses (must equal Part IX, column (A), line 25)	2			
3	Revenue less expenses Subtract line 2 from line 1	3			
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4			130,031
5	Net unrealized gains (losses) on investments	5			282,971
6	Donated services and use of facilities	6			
7	Investment expenses	7			
8	Prior period adjustments	8			
9	Other changes in net assets or fund balances (explain in Schedule O)	9			0
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10		8,4	161,622
Par	t XII Financial Statements and Reporting				
	Check if Schedule O contains a response or note to any line in this Part XII				. Г
				Yes	No
1	Accounting method used to prepare the Form 990				
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		2a		Νo
	If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or review a separate basis, consolidated basis, or both	wed o	n		
	Separate basis Consolidated basis Both consolidated and separate basis				
b	Were the organization's financial statements audited by an independent accountant?		2b	Yes	
	If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a sepa basis, consolidated basis, or both	rate			
	▼ Separate basis				
c	If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversigh audit, review, or compilation of its financial statements and selection of an independent accountant?	nt of th	ne <b>2с</b>	Yes	
	If the organization changed either its oversight process or selection process during the tax year, explain it Schedule O	n			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	e	3a		No
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		3b		

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OMB No 1545-0047

#### **SCHEDULE A**

(Form 990 or 990EZ)

Department of the Treasury Internal Revenue Service

### **Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1)nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Open to Public Inspection

	<b>me of the organization</b> E SCHOTT FDTN FOR PUBLIC EDUCATION						Employer identification	ation number				
INE S	СПОТТ	FUIN FOR PUBLIC EDUCATI	ON				04-3457065					
Pa	rt I	Reason for Publi	c Charity S	Status (All organiza	itions must co	mplete this r		ns				
		zation is not a private f						71101				
1	Ĭ.	A church, convention		· ·	= :	· ·	•					
2	<u></u>	A school described in	•				-,(-,(-,,					
3	<u>'</u>	A hospital or a cooper				tion 170(h)(1)	(A)(iii)					
4	<u>'</u>	A medical research or		_				i) Enterthe				
7	'	hospital's name, city,		erated in Conjunction v	vitii a nospitai u	lescribed iii <b>sec</b>		. Linter the				
5	Г	An organization opera	ted for the ber	nefit of a college or uni	versity owned o	or operated by a	a governmental unit d	escribed in				
	·	section 170(b)(1)(A)			,	. ,	-					
6	Г	A federal, state, or loc			described in <b>se</b>	ection 170(b)(1	L)(A)(v).					
7	Ī	An organization that n						neneral public				
-	,	described in <b>section 1</b>				om a governme		, c c. a. pas c				
8	Γ	A community trust de				tII)						
9	Γ	An organization that n	ormally receiv	es (1) more than 33:	1/3% of its supp	ort from contro	butions, membership	fees, and gross				
		receipts from activitie	s related to it	s exempt functions—s	ubject to certai	n exceptions, a	ind (2) no more than 3	331/3% of				
		ıts support from gross	ınvestment ır	ncome and unrelated b	usıness taxable	e income (less	section 511 tax) from	n businesses				
		acquired by the organ	ızatıon after Ju	ine 30, 1975 See <b>sec</b>	tion 509(a)(2).	(Complete Par	rt III )					
10	Γ	An organization organ	ized and opera	ated exclusively to tes	t for public safe	ty See <b>section</b>	n 509(a)(4).					
11 An organization organ			ganized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of									
		one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See <b>section 509(a)(3).</b> Check										
	_	the box in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g										
а	ı	<b>Type I.</b> A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the										
	supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the organization You must complete Part IV, Sections A and B.						ors or crustees or the	supporting				
Ь	Г					with its suppo	rted organization(s), l	n(s), by having control or				
		management of the supporting organization vested in the same persons that control or manage the supported organization(s) You										
	_	must complete Part I		Sections A and C. tegrated. A supporting organization operated in connection with, and functionally integrated with, its								
С	ı							grated with, its				
d	Г	supported organizatio  Type III non-function						ianization(s) that is				
<b>u</b>	'											
		(see instructions) Yo	not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement see instructions). You must complete Part IV, Sections A and D, and Part V.									
е	Γ	Check this box if the o					s a Type I, Type II, T	ype III functionally				
_		integrated, or Type II										
f		Enter the number of s										
g		Provide the following i	nformation ab	out the supported orga	inization(s)							
	(i)Na	ame of supported	(ii) EIN	(iii) Type of	(iv) Is the org	ganization	(v) A mount of	(vi) A mount of				
organization				organization	listed in your	governing	monetary support	other support (see				
				(described on lines	docume	nt?	(see instructions)	ınstructıons)				
				1-9 above or IRC								
				section (see instructions))								
				mstractions))	Yes	No						
<del></del>												

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

S	ection A. Public Support	•	•		, ,				
Cale	endar year (or fiscal year beginning in) 🕨	(a) 2010	<b>(b)</b> 2011	(c) 2012	( <b>d)</b> 2013	(e) 2014	(f) Total		
1	Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants")	13,558,997	2,794,345	1,909,990	3,275,477	4,706,0	21 26,244,830		
2	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf								
3	The value of services or facilities furnished by a governmental unit								
4 5	to the organization without charge <b>Total.</b> Add lines 1 through 3  The portion of total contributions	13,558,997	2,794,345	1,909,990	3,275,477	4,706,0	21 26,244,830		
	by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column						19,842,158		
6	(f) <b>Public support.</b> Subtract line 5 from line 4						6,402,672		
S	ection B. Total Support								
Cale	endar year (or fiscal year beginning in) 🟲	(a) 2010	<b>(b)</b> 2011	(c) 2012	( <b>d)</b> 2013	<b>(e)</b> 2014	(f) Total		
7	A mounts from line 4	13,558,997	2,794,345	1,909,990	3,275,477	4,706,02	26,244,830		
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	18,939	120,467	155,535	142,766	182,31	.1 620,018		
9	Net income from unrelated business activities, whether or not the business is regularly carried on	35,000	35,000	20,000	20,000	20,00	130,000		
10	Other income Do not include gain or loss from the sale of capital assets (Explain in Part VI)	16,850	74,673			1,35	92,874		
11	Total support Add lines 7 through 10						27,087,722		
12	Gross receipts from related activiti	es, etc (see instr	ructions)			12			
13	First five years. If the Form 990 is organization, check this box and st								
S	ection C. Computation of Pul								
14	Public support percentage for 2014	1 (lıne 6 , column (	f) divided by line	11, column (f))		14	23 640 %		
15	Public support percentage for 2013	3 Schedule A, Par	t II, line 14			15	25 240 %		
16a	33 1/3% support test—2014. If the and stop here. The organization qua				ne 14 is 33 1/3%	or more, chec	k this box		
	b 33 1/3% support test—2013. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization  10%-facts-and-circumstances test—2014. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported.								
b 18	organization  10%-facts-and-circumstances test  15 is 10% or more, and if the organization  Explain in Part VI how the organization  Private foundation. If the organization	nization meets the tion meets the "fa	e "facts-and-circu acts-and-circums	imstances" test, tances" test The	check this box ar organization qua	nd <b>stop here.</b> Ilifies as a pub			
	instructions	a.a noconcor		, ,	. 1. 1, 5,1568 6,113	20 una 200	<b>▶</b> ┌		

Schedule A (Form 990 or 990-EZ) 2014 Page 3 Support Schedule for Organizations Described in Section 509(a)(2) (Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.) Section A. Public Support Calendar year (or fiscal year beginning (a) 2010 **(b)** 2011 (c) 2012 (d) 2013 (e) 2014 (f) Total in) 🟲 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants") Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose Gross receipts from activities that are not an unrelated trade or business under section 513 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf The value of services or facilities furnished by a governmental unit to the organization without charge Total. Add lines 1 through 5 7a Amounts included on lines 1, 2, and 3 received from disqualified persons Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year c Add lines 7a and 7b Public support (Subtract line 7c from line 6) Section B. Total Support Calendar year (or fiscal year beginning (a) 2010 **(b)** 2011 (c) 2012 (d) 2013 (e) 2014 (f) Total in) 🟲 Amounts from line 6 Gross income from interest, 10a dividends, payments received on securities loans, rents, royalties and income from similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 Add lines 10a and 10b C Net income from unrelated 11 business activities not included in line 10b, whether or not the business is regularly carried on Other income Do not include 12 gain or loss from the sale of capital assets (Explain in Part VI) Total support. (Add lines 9, 10c, 11. and 12) First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here Section C. Computation of Public Support Percentage Public support percentage for 2014 (line 8, column (f) divided by line 13, column (f)) 15

15 Public support percentage for 2014 (line 8, column (f) divided by line 13, column (f))

16 Public support percentage from 2013 Schedule A, Part III, line 15

Section D. Computation of Investment Income Percentage

17 Investment income percentage from 2014 (line 10c, column (f) divided by line 13, column (f))

18 Investment income percentage from 2013 Schedule A, Part III, line 17

18

19a 33 1/3% support tests—2014. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

b 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

#### Part IV Supporting Organizations

(Complete only if you checked a box on line 11 of Part I If you checked 11a of Part I, complete Sections A and B If you checked 11b of Part I, complete Sections A and C If you checked 11c of Part I, complete Sections A, D, and E If you checked 11d of Part I, complete Sections A and D, and complete Part V  $\,)$ 

Section A. All Supporting Organizations
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Se	ection A. All Supporting Organizations			
			Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.	1		
2	Did the organization have any supported organization that does not have an IRS determination of status under section $509(a)(1)$ or $(2)$ ? If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section $509(a)(1)$ or $(2)$ .	2		
За	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.	За		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.	3b		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.	3с		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked 11a or 11b in Part I, answer (b) and (c) below.	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.	4b		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections $501(c)(3)$ and $509(a)(1)$ or $(2)^7$ If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section $170(c)(2)(B)$ purposes.	4c		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document).	5a		
b	<b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b		
c	Substitutions only. Was the substitution the result of an event beyond the organization's control?	5c		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations, (b) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in <b>Part VI</b> .	6		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part II of Schedule L (Form 990).	8		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509 (a)(1) or (2))? If "Yes," provide detail in <b>Part VI</b> .	9a		
b	Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If</i> "Yes," provide detail in <b>Part VI</b> .	9b		
c	Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in <b>Part VI</b> .	9c		
L0a	Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer b below.	10a		
b	Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings).	10b		
l1	Has the organization accepted a gift or contribution from any of the following persons?			
а	A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below,			
	the governing body of a supported organization?	11a		
b	A family member of a person described in (a) above?	11b		

c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.

11c

Pa	rt IV Supporting Organizations (continued)			
S	ection B. Type I Supporting Organizations			
			Yes	No
1	Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.	1		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.	2		
S	ection C. Type II Supporting Organizations			
			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).	1		
S	ection D. All Type III Supporting Organizations			
			Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (1) a written notice describing the type and amount of support provided during the prior tax year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	1		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).	2		
3	By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.	3		
S	ection E. Type III Functionally-Integrated Supporting Organizations			
1	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see  The organization satisfied the Activities Test Complete line 2 below  The organization is the parent of each of its supported organizations. Complete line 3 below  The organization supported a governmental entity. Describe in Part VI how you supported a government entity instructions.			
2	Activities Test Answer (a) and (b) below.		Yes	No
	a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.	2a		
	<b>b</b> Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.	2b		
3				
	a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI.	3a		
	b Did the organization exercise a substantial degree of direction over the policies, programs and activities of each		1 1	

of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.

3b

#### Part V - Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1	_	Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov 20, 1970 See instructions. All other
ype	[]	II non-functionally integrated supporting organizations must complete Sections A through E

	Section A - Adjusted Net Income	(A) Prior Year	(B) Current Year (optional)	
1	Net short-term capital gain	1		
2	Recoveries of prior-year distributions	2		
3	Other gross income (see instructions)	3		
4	Add lines 1 through 3	4		
5	Depreciation and depletion	5		
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6		
7	Other expenses (see instructions)	7		
8	Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8		

	Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year)	1		
а	Average monthly value of securities	1a		
b	Average monthly cash balances	1b		
c	Fair market value of other non-exempt-use assets	1c		
d	Total (add lines 1a, 1b, and 1c)	1d		
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI)			
2	Acquisition indebtedness applicable to non-exempt use assets	2		
3	Subtract line 2 from line 1d	3		
4	Cash deemed held for exempt use Enter 1-1/2% of line 3 (for greater amount, see instructions)	4		
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6	Multiply line 5 by 035	6		
7	Recoveries of prior-year distributions	7		
8	Minimum Asset Amount (add line 7 to line 6)	8		

#### Section C - Distributable Amount

- **1** Adjusted net income for prior year (from Section A, line 8, Column A)
- 2 Enter 85% of line 1
- 3 Minimum asset amount for prior year (from Section B, line 8, Column A)
- 4 Enter greater of line 2 or line 3
- 5 Income tax imposed in prior year
- **6 Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)
- 7 Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)

	Current Year
1	
2	
3	
4	
5	
6	

Section D - Distributions	Current Year		
1 Amounts paid to supported organizations to accom			
2 Amounts paid to perform activity that directly furthexcess of income from activity	ported organizations, in		
3 Administrative expenses paid to accomplish exemp	anızatıons		
4 Amounts paid to acquire exempt-use assets			
5 Qualified set-aside amounts (prior IRS approval rec	nured)		
6 Other distributions (describe in Part VI) See instru	JCTIONS		
7 Total annual distributions. Add lines 1 through 6			
8 Distributions to attentive supported organizations t details in Part VI) See instructions	o which the organization is r	esponsive (provide	
9 Distributable amount for 2014 from Section C, line	6		
10 Line 8 amount divided by Line 9 amount			
		(::)	(:::)
Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2014	(iii) Distributable Amount for 2014
1 Distributable amount for 2014 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2014 (reasonable cause requiredsee instructions)			
3 Excess distributions carryover, if any, to 2014			
<b>a</b> From 2009			
<b>b</b> From 2010			
<b>c</b> From 2011			
d From 2012			
<b>e</b> From 2013			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2014 distributable amount  i Carryover from 2009 not applied (see instructions)			
j Remainder Subtract lines 3g, 3h, and 3i from 3f			
4 Distributions for 2014 from Section D, line 7 \$			
A pplied to underdistributions of prior years			
<b>b</b> Applied to 2014 distributable amount			
c Remainder Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2014, if any Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions)			
6 Remaining underdistributions for 2014 Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions)			
<b>7 Excess distributions carryover to 2015.</b> Add lines 3j and 4c			
8 Breakdown of line 7			
<b>a</b> From 2010			
<b>b</b> From 2011			
<b>c</b> From 2012			
d From 2013			

Schedule A (Form 990 or 990-EZ) 2014 Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions) **Facts And Circumstances Test** THE SCHOTT FOUNDATION MEETS THE "FACTS AND CIRCUMSTANCES" TESTTHE SCHOTT FOUNDATION FOR PUBLIC EDUCATION (THE "FOUNDATION") QUALIFIES AS A "PUBLICLY SUPPORTED ORGANIZATION UNDER SECTION 170(B)(1)(A)(VI) OF THE CODE BECAUSE IT SATISFIES THE "FACTS AND CIRCUMSTANCES" TEST SET FORTH IN TREAS REG 1 170A-9(F)(3) THE FOUNDATION NORMALLY RECEIVES AT LEAST 10% OF ITS SUPPORT FROM THE GENERAL PUBLIC, AND IT CARRIES ON A CONTINUOUS AND BONA FIDE PROGRAM OF SOLICITATION OF PUBLIC SUPPORT MOREOVER, THE FOUNDATION MEETS THE FOLLOWING FACTORS ENUMERATED IN THE REGULATIONS AS BEING INDICATIVE OF PUBLIC SUPPORT 1 PERCENTAGE OF FINANCIAL SUPPORT TREAS REG 1 170A-9(F)(3)(III) DURING THE FIVE-YEAR PERIOD ENDING ON JUNE 30, 2015, THE PORTION OF THE FOUNDATION'S SUPPORT THAT QUALIFIES AS ELIGIBLE PUBLIC SUPPORT IS 23 64%, WELL IN EXCESS OF THE 10% THRESHOLD 2 SOURCES OF SUPPORT TREAS REG 1 170A-9(F)(3)(IV) DURING THE PAST FIVE TAX YEARS, THE FOUNDATION HAS RECEIVED CONTRIBUTIONS FROM A RANGE OF DONORS, INCLUDING PRIVATE INDIVIDUALS AND FAMILIES, CORPORATIONS, PRIVATE FOUNDATIONS AND PUBLIC CHARITIES 3 REPRESENTATIVE GOVERNING BODY TREAS REG 1 170A-9(F)(3)(V) THE FOUNDATION'S NINE-MEMBER BOARD OF DIRECTORS CLEARLY REPRESENTS BROAD PUBLIC INTERESTS A MAJORITY OF THE DIRECTORS MEET THIS REQUIREMENT BECAUSE THEY ARE PUBLIC OFFICIALS ACTING IN THEIR CAPACITIES AS SUCH, PERSONS HAVING SPECIAL KNOWLEDGE OR EXPERTISE IN THE EDUCATION FIELD IN WHICH THE FOUNDATION OPERATES, AND OTHERS WHO REPRESENT A BROAD CROSS-SECTION OF THE COMMUNITY SEE TREAS REG 1 170A-9(F)(3)(V) THE FOLLOWING ARE BRIEF BIOGRAPHIES OF THE FOUNDATION'S DIRECTORS GREG JOBIN-LEEDS GREG JOBIN-LEEDS IS CO-FOUNDER AND CO-CHAIR OF THE BOARD OF THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION IN 1993, UNDER MR JOBIN-LEEDS' LEADERSHIP, SCHOTT BEGAN FUNDING THE CAMPAIGN FOR FISCAL EQUITY (CFE) AND LATER HELPED FOUND THE ALLIANCE FOR QUALITY EDUCATION (AQE) SCHOTT RECRUITED THE LEADERSHIP AND PROVIDED THE START-UP FUNDING FOR THE EARLY EDUCATION FOR ALL (EEA) CAMPAIGN IN MASSACHUSETTS, AND REGULARLY PUBLISHES STATE REPORT CARDS ON "PUBLIC EDUCATION AND BLACK MALE STUDENTS" IN PARTNERSHIP WITH TEACHER'S COLLEGE AND COLUMBIA UNIVERSITY, MR JOBIN-LEEDS HELPED LAUNCH THE NATIONAL ACADEMY FOR EXCELLENT TEACHING TO IMPROVE TEACHING IN URBAN SCHOOLS MR JOBIN-LEEDS IS THE FOUNDING CHAIR OF PROGRESSIVE MAJORITY'S LEADERSHIP CIRCLE, WHICH IS HIGHLY SUCCESSFUL AT ELECTING BOLD STATE CANDIDATES COMMITTED TO RACIAL AND ECONOMIC JUSTICE, PUBLIC EDUCATION AND HEALTH CARE. HE IS A FOUNDING EXECUTIVE BOARD MEMBER OF CONGRESSWOMAN BARBARA LEE'S ONE VOICE PAC, WHICH IS SUCCESSFUL IN ELECTING PROGRESSIVE FEDERAL CANDIDATES WHO HAVE STRONG PLATFORMS ON PUBLIC EDUCATION, RACIAL AND ECONOMIC JUSTICE. EARLY IN HIS CAREER, HE WORKED AS A HIGH SCHOOL ENGLISH TEACHER, THEN HE TRAINED ADULT LITERACY TEACHERS AND MORE RECENTLY HE HAS WORKED TO INCREASE POLITICAL ACCESS FOR DISENFRANCHISED POPULATIONS MR JOBIN-LEEDS HAS A MASTER'S DEGREE FROM TEACHER'S COLLEGE, COLUMBIA UNIVERSITY, AND MORE THAN TWENTY-FIVE YEARS OF EDUCATION, PUBLIC POLICY, MEDIA, COMMUNITY ORGANIZING AND LEADERSHIP EXPERIENCE LILO J LEEDS LILO LEEDS CREATED THE FIRST ON-SITE DAY CARE AND INFANT CARE CENTER ON LONG ISLAND AT CMP MEDIA INC. SHE ALSO STARTED AN AFTER SCHOOL ON-SITE CENTER AND A SUMMER DAY CAMP FOR CMP MEDIA INC. EMPLOYEE'S SCHOOL AGED CHILDREN. LILO LEEDS IS CO-FOUNDER AND CO-CHAIRPERSON OF THE INSTITUTE FOR STUDENT A CHIEVEMENT, A NON-PROFIT ORGANIZATION COMMITTED TO ECONOMIC AND SOCIAL CHANGE IN DISADVANTAGED COMMUNITIES THROUGH EDUCATION AND YOUTH PROGRAMS SHE AND HER HUSBAND GERARD, CREATED THE MANHASSET-BASED INSTITUTE IN 1990 CORPORATE ENTREPRENEURS, GERARD AND LILO LEEDS, CO-FOUNDED CMP MEDIA INC., A LEADING PUBLISHER OF BUSINESS NEWSPAPERS, MAGAZINES AND INFORMATION SERVICES SPECIALIZING IN HIGH TECHNOLOGY LILO LEEDS IS ONE OF THE FOUNDERS AND DIRECTORS OF THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION, AN ORGANIZATION DEVOTED TO DEVELOPING AND STRENGTHENING THE MOVEMENT FOR EQUITY IN EDUCATION AND CHILDCARE LILO LEEDS IS A MEMBER OF THE CHILD CARE COUNCIL OF NASSAU COUNTY, THE GREAT NECK/MANHASSET COMMUNITY CHILD CARE PARTNERSHIP, AND SERVES ON THE ADVISORY BOARD OF THE ARNOLD AND JOAN SALTZMAN/HOFSTRA CHILD CARE CENTER LILO LEEDS WAS AN ASSOCIATE TRUSTEE OF

NORTH SHORE UNIVERSITY HOSPITAL AND IS ON THE BOARD OF THE NORTH SHORE CHILD & FAMILY GUIDANCE LILO LEEDS SERVES AS AN HONOREE OF WOMEN ON THE JOB, WAS NAMED "WOMAN OF THE YEAR" BY THE LONG ISLAND ASSOCIATION, WAS AN HONOREE OF THE NATIONAL ORGANIZATION OF WOMEN AND RECEIVED THE BARBARA KRAMER MEMORIAL AWARD FROM THE PORT WASHINGTON CHILDREN'S CENTER MR AND MRS LEEDS WERE RECOGNIZED AS HONORARY CITIZENS OF ROOSEVELT FOR THEIR WORK WITH THE STAR PROGRAM FOR THE ROOSEVELT HIGH SCHOOL, AND FOR THE "WRITING TO READ" PROGRAM FOR KINDERGARTEN AND FIRST GRADE, IN WESTBURY MRS LEEDS IS A REFUGEE FROM HITLER GERMANY AND CAME TO THE US IN 1939 SHE HOLDS A B S IN MATHEMATICS FROM QUEENS COLLEGE AND AN M.A. FROM SUNY AT STONY BROOK. SHE RECEIVED AN HONORARY DOCTORATE FROM BOTH INSTITUTIONS MRS LEEDS IS A LONG-TIME RESIDENT OF LONG ISLAND AND HAS FIVE GROWN CHILDREN BAISHALI RINKU SEN BAISHALI RINKU SEN IS CO-CHAIR OF THE BOARD OF THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION A LEADING FIGURE IN THE RACIAL JUSTICE MOVEMENT, BAISHALI HAS POSITIONED THE RACE FORWARD FORMERLY KNOWN AS APPLIED RESEARCH CENTER (ARC) AS THE HOME FOR MEDIA AND ACTIVISM ON RACIAL JUSTICE. SHE HAS EXTENSIVE EXPERTISE IN RACE, FEMINISM, IMMIGRATION AND ECONOMIC JUSTICE. OVER THE COURSE OF HER CAREER, BAISHALI HAS WOVEN TOGETHER JOURNALISM AND ORGANIZING TO FURTHER SOCIAL CHANGE SHE ALSO HAS SIGNIFICANT EXPERIENCE IN PHILANTHROPY, AS VICE CHAIR OF THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION, AND AS AN ADVISORY COMMITTEE MEMBER OF THE PHILANTHROPIC INITIATIVE FOR RACIAL EQUITY PREVIOUSLY, SHE WAS THE CO-DIRECTOR OF THE CENTER FOR THIRD WORLD ORGANIZING BAISHALI HAS WRITTEN EXTENSIVELY ABOUT IMMIGRATION, COMMUNITY ORGANIZING AND WOMEN'S LIVES FOR A WIDE VARIETY OF PUBLICATIONS INCLUDING THE HUFFINGTON POST, JACK AND JILL POLITICS, THE SAN FRANCISCO CHRONICLE, FORBES COM, ALTERNET, TOMPAINE COM, AND RACEWIRE HER BOOK, STIR IT UP LESSONS IN COMMUNITY ORGANIZING (JOSSEY-BASS) WAS COMMISSIONED BY THE MS FOUNDATION FOR WOMEN AND RELEASED IN THE FALL OF 2003 HER LATEST BOOK, THE ACCIDENTAL AMERICAN IMMIGRATION AND CITIZENSHIP IN THE AGE OF GLOBALIZATION (BERRETT-KOEHLER) WON THE NAUTILUS BOOK AWARD SILVER MEDAL PREVIOUSLY, BAISHALI SERVED AS THE COMMUNICATIONS DIRECTOR AND THE DIRECTOR OF THE TRANSNATIONAL RACIAL JUSTICE INITIATIVE AT ARC BAISHALI STARTED HER ORGANIZING CAREER AS A STUDENT ACTIVIST AT BROWN UNIVERSITY, FIGHTING RACE, GENDER AND CLASS DISCRIMINATION ON CAMPUSES SHE RECEIVED A B A IN WOMEN'S STUDIES FROM BROWN UNIVERSITY IN 1988 AND AN M S IN JOURNALISM AT COLUMBIA UNIVERSITY IN 2005 HER AWARDS AND HONORS INCLUDE THE 2009 NORTHSTAR FUND NEWS PRIZE, THE 2008 PROGRESSIVE LEADERSHIP AWARD. FROM CITIZEN ACTION OF NEW YORK, AND BEING NAMED BY UTNE READER ONE OF THE FIFTY ACTIVISTS, ARTISTS, SCIENTISTS, AND NON-CONFORMISTS WHO MADE THEIR LIST OF VISIONARIES WORKING IN SOCIAL JUSTICE AND COMMUNITY ORGANIZATION, TRANSFORMING TECHNOLOGY AND THE WORLD IN 2008 MICHELLE COFFEY AS EXECUTIVE DIRECTOR, MICHELLE COFFEY DESIGNS, IMPLEMENTS AND FURTHERS THE STRATEGIC AGENDA, LEADERSHIP AND VISION OF LAMBENT FOUNDATION. THROUGH INNOVATIVE GRANT MAKING, LAMBENT FOUNDATION SUPPORTS THE INTERSECTIONS OF ARTS AND CULTURE AS CRITICAL STRATEGIES FOR SOCIAL CHANGE PRIOR TO THE CREATION OF LAMBENT FOUNDATION IN JANUARY 2009, MS COFFEY WAS DIRECTOR OF STARRY NIGHT FUND AND SENIOR PHILANTHROPIC ADVISOR AT TIDES FOUNDATION WITH A GLOBAL LENS, HER AREAS OF FOCUS INCLUDED HUMAN RIGHTS, WOMEN/GIRLS, CRIMINAL JUSTICE REFORM, ARTS AND CULTURE AND HIV/AIDS MICHELLE COFFEY JOINED TIDES AS A PROGRAM OFFICER IN THE NEW YORK OFFICE IN 2001 PRIOR TO JOINING TIDES, SHE WORKED ON NATIONAL CULTURAL POLICY ISSUES AND SERVED AS A PROGRAM OFFICER FOR THE NEW YORK FOUNDATION FOR THE ARTS IN ADDITION, SHE SERVES ON THE BOARDS OF THE CULTURE PROJECT, THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION AND THE BROWNSVILLE MULTI-SERVICE FAMILY HEALTH CARE CENTER IN EAST NEW YORK Return Reference Explanation ANDREW GILLUM CITY COMMISSIONER ANDREW D GILLUM, AN ALUMNUS OF FLORIDA A&M PART II. SECTION C. LINE 17A. FACTS AND CIRCUMSTANCES UNIVERSITY (FAMU), FORMER PRESIDENT OF THE STUDENT GOVERNMENT ASSOCIATION, AND FAMU'S FIRST STUDENT MEMBER OF THE BOARD OF TRUSTEES BECAME THE YOUNGEST PERSON EVER ELECTED TO THE FOUR-MEMBER TALLAHASSEE CITY COMMISSION IN FEBRUARY 2003 WHEN ELECTED AT THE AGE OF 23, HE WAS A STUDENT MAJORING IN POLITICAL SCIENCE PASSION FOR PUBLIC SERVICE, AND THE ABILITY TO MOTIVATE AND MOBILIZE PEOPLE TO ACTION GARNERED HIS RE-ELECTION IN AUGUST 2004 TO A FOUR YEAR TERM ON THE COMMISSION COMMISSIONER GILLUM HAS HELD PROMINENT LEADERSHIP ROLES SUCH AS MAYOR PRO TEM, CHAIRMANCAPITAL REGION TRANSPORTATION PLANNING AGENCY AND LEAD COMMISSIONER FOR THE LONG RANGE COMMUNITY BASED TARGET ISSUE COMMITTEE IN KEEPING WITH HIS MANTRA TO UPLIFT AND BUILD THE COLLECTIVE COMMUNITY, ANDREW HAS CHAMPIONED SEVERAL COMMUNITY INITIATIVES INCLUDING THE NIMS MIDDLE SCHOOL DIGITAL HARMONY PILOT PROGRAM, THE LANDLORD TENANT MEDIATION PROGRAM, THE CODE ENFORCEMENT AMNESTY PROGRAM, AND THE CREATION OF THE SILVER LAKE NEIGHBORHOOD PARK COMMISSIONER GILLUM SERVED AS FIELD ORGANIZER AND STATEWIDE DIRECTOR OF THE 'ARRIVE WITH 5" PROGRAM WITH PEOPLE FOR THE AMERICAN WAY FOUNDATION (PFAWF) HE ORGANIZED THE LARGEST "ARRIVE WITH 5" GET-OUT-THE-VOTE CAMPAIGN IN FLORIDA'S HISTORY HE ALSO WORKED AS DEPUTY POLITICAL DIRECTOR WITH THE FLORIDA DEMOCRATIC PARTY HE WAS THE INAUGURAL NATIONAL DIRECTOR OF THE YOUNG ELECTED OFFICIALS NETWORK WITH PFAWF, IN WHICH HE INITIATED AND SPEARHEADED A PROGRAM THAT UNITES ELECTED OFFICIALS AGE 35 AND UNDER IN A NETWORK THAT SUPPORTS THEM WITH LEADERSHIP AND PERSONAL DEVELOPMENT TRAINING AND PUBLIC POLICY SUPPORT HIS SUCCESS GARNERED HIM THE POSITION OF DIRECTOR OF YOUTH LEADERSHIP PROGRAMS FOR PFAWF IN THIS ROLE HE OVERSEES THE STRATEGIC PLANNING, IMPLEMENTATION, AND DEVELOPMENT OF THREE PROGRAM AREAS YOUNG PEOPLE FOR, YOUNG ELECTED OFFICIALS NETWORK, AND THE YOUNG PROFESSIONALS ACTIVIST NETWORK COMMISSIONER GILLUM SERVES AS A MEMBER OF THE BOARD OF DIRECTORS FOR THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION HE ALSO HAS BEEN RECOGNIZED AS AN EMERGING LEADER BY THE CONGRESSIONAL BLACK CAUCUS, JET MAGAZINE, EBONY MAGAZINE, THE ASSOCIATION OF TRIAL LAWYERS FOR AMERICA (ATLA), THE DRUM MAJOR INSTITUTE, IMPACT AND FAMUS DR MARTIN LUTHER KING JR LEADERSHIP AWARD PART II, SECTION C, LINE 17A, MARIA JOBIN-LEEDS AS CO-FOUNDER AND MANAGING PARTNER OF THE JOBIN-LEEDS FACTS AND CIRCUMSTANCES PARTNERSHIP FOR DEMOCRACY AND EDUCATION, LLC, MARIA WITH HER SPOUSE GREG PLANS AND DIRECTS THE FIRM'S RESEARCH, INVESTMENTS, PROGRAMS, CLIENT SERVICES, GRANTS MANAGEMENT, STRATEGIC ALLIANCES, COMMUNICATIONS AND OPERATIONS SHE IS LEADING THE PARTNERSHIP'S FORMATION OF A PIPELINE FOR PROGRESSIVE WOMEN CANDIDATES IN MASSACHUSETTS FOR MORE THAN A DECADE, MARIA HAS MARSHALED RESOURCES FOR CANDIDATES AND BALLOT QUESTIONS THAT MOTIVATE THE ELECTORATE AND SPEAK TO ISSUES THAT ARE IMPORTANT TO LOW INCOME COMMUNITIES, AFRICAN AMERICANS, LATINOS, IMMIGRANTS AND WOMEN MARIA'S CAREER IN PHILANTHROPY AND CIVIC ENGAGEMENT BEGAN AT AN EARLY AGE FROM WATCHING AND HELPING HER PARENTS IN THEIR EFFORTS ON CIVIL RIGHTS AND FEMINISM AND GLOBAL CITIZENSHIP SHE WAS BORN AND LIVED IN PUERTO RICO AS A CHILD, AND SHE SPENT TIME IN THE SUDAN AS A COLLEGE STUDENT, WHERE HER EDUCATION ABOUT THE PRIVILEGES OF CLASS, RACE AND GENDER BEGAN MARIA STARTED HER EDUCATION CAREER AS A HEALTH AND BIOLOGY TEACHER IN A PAROCHIAL, INNER-CITY HIGH SCHOOL SHE SPENT THE FIRST TEN YEARS OF THE HIV/AIDS EPIDEMIC PROVIDING COUNSELING TO PEOPLE TESTING POSITIVE FOR HIV AND TRAINING AIDS EDUCATORS SHE CAME TO UNDERSTAND THAT ONLY BY ADDRESSING A ROOT CAUSE OF THE EPIDEMIC THE LACK OF POLITICAL POWER ON THE PART OF PEOPLE AFFECTED WOULD THERE BE ANY CHANCE FOR SUCCESS IN CURBING THE PROBLEM IN 1999, MARIA FOUNDED THE ACCESS STRATEGIES FUND AS CHAIR, WITH THE BOARD AND STAFF, THEY ADDRESS THE POLITICAL ROOT CAUSES OF SOCIAL AND ECONOMIC DISPARITIES ACCESS STRATEGIES FUNDS AND ASSISTS COMMUNITY BASED ORGANIZATIONS IN UNDERREPRESENTED, LOW-INCOME, COMMUNITIES OF COLOR AND WOMEN'S COMMUNITIES TO MAKE THEIR VOICES HEARD IN THE CREATION OF SOUND PUBLIC POLICIES IN MASSACHUSETTS THIS COLLABORATIVE,

MOVEMENT BUILDING WORK HAS PRODUCED LARGE INCREASES IN VOTER TURNOUT IN URBAN AFRICAN AMERICAN, LATINO AND IMMIGRANT COMMUNITIES IN THE COMMONWEALTH MARIA RELISHES AND ENCOURAGES THE NOW FREQUENT WINNING CANDIDATES RESULTING FROM COMMUNITY ORGANIZING AND INCREASED VOTER TURNOUT SUPPORTED BY ACCESS AND SHE LOOKS FORWARD TO THE RESULTING SHIFTS IN POLICY AND BUDGET PRIORITIES MARIA'S STRATEGY IS TO BUILD ORGANIZATIONAL CAPACITY FOR PROGRESSIVES AND TO HELP CREATE OPPORTUNITY FOR THESE PERSONNEL TO BECOME LEADERS AND THEIR ORGANIZATIONS AND ISSUES TO BECOME MAINSTREAM AND PROVIDE FOR THE COMMON GOOD MARIA HELPED FOUND THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION IN 1991, SHAPING MISSION, STRATEGY, BOARD, SENIOR STAFF AND OUTCOMES, MOST RECENTLY AS CHAIR OF THE STRATEGY COMMITTEE SCHOTT SUPPORTS THE MOVEMENT FOR HIGH QUALITY EDUCATION BY ELEVATING THE LEADERSHIP OF WOMEN AND SUPPORTING THE GRASSROOTS, BRINGING NATIONAL ATTENTION TO SYSTEMIC DISCRIMINATION AGAINST BLACK BOYS, AND LEADING FUNDING EFFORTS TO BETTER NURTURE ALL CHILDREN MARIA WAS A GRANTS ADVISOR TO TIDES FOUNDATION VOTER ACTION FUND AND IS ON THE BOARD OF CAMPAIGN FOR AMERICA'S FUTURE/IAF THE FORMER COMMONWEALTH COALITION OF MASSACHUSETTS BOARD ALSO SOLICITED HER MEMBERSHIP SHE HAS ADVISED DONORS AND OUNDATIONS FOCUSED ON ELECTORAL ENGAGEMENT, AND LED WORKSHOPS AT FOUNDATION CONFERENCES SHOWCASING THE WORK OF GRANTEE PARTNERS IN CIVIC ENGAGEMENT HER FINANCIAL INVESTMENT ACUMEN MARRIES SOCIALLY-RESPONSIBLE INVESTING WITH ABOVE-AVERAGE RETURNS SHE IS RECOGNIZED BY THE CRITICAL IMPACT AWARD FROM THE COUNCIL ON FOUNDATIONS TO SCHOTT, THE MONSIGNOR ROMERO AWARD FROM THE FOUNDATION FOR SELF SUFFICIENCY IN CENTRAL AMERICA (FSSCA), AND THE MORGENTHAU AWARD FOR HUMAN RIGHTS FROM THE CAMBRIDGE CITY DEMOCRATIC COMMITTEE SHE WAS A 2008 RECIPIENT OF THE CENTER FOR COMMUNITY CHANGE CHAMPION AWARD HONORING HER EFFORTS IN IMMIGRANT AND POOR PEOPLE'S CIVIC ADVANCEMENT MARIA HELPED TO ESTABLISHED YOUNG SISTERS FOR JUSTICE AT THE BOSTON WOMEN'S FUND, GETTING GIRLS TO DIRECT PHILANTHROPY TO GIRLS MARIA EARNED A MASTERS DEGREE FROM THE HARVARD GRADUATE SCHOOL OF EDUCATION AND BACHELOR'S DEGREE FROM COLBY COLLEGE MAISIE CHIN MAISIE CHIN IS CO-FOUNDER AND CURRENT DIRECTOR OF CADRE COMMUNITY ASSET DEVELOPMENT RE-DEFINING EDUCATION, AN INDEPENDENT, GRASSROOTS PARENT MEMBERSHIP ORGANIZATION IN SOUTH LOS ANGELES COMPRISED OF LOW-INCOME AFRICAN AMERICAN AND LATINO PARENTS/CAREGIVERS AFTER WORKING IN A K-16 INSTITUTIONAL AND FOUNDATION COLLABORATION AROUND EDUCATION REFORM FOR OVER SIX YEARS, MS CHIN AND A SOUTH LA PARENT LAUNCHED CADRE IN 2001 CADRE'S MISSION IS TO SOLIDIFY AND ADVANCE PARENT LEADERSHIP TO ENSURE THAT ALL CHILDREN ARE RIGHTFULLY EDUCATED REGARDLESS OF WHERE THEY LIVE THROUGH HUMAN RIGHTS-BASED COMMUNITY ORGANIZING AND POLICY ADVOCACY, CADRE PARENT LEADERS ARE FIGHTING TO END THE PUSHOUT OF LOW-INCOME FAMILIES OF COLOR FROM PUBLIC SCHOOLS AND THE SCHOOL-TO-PRISON PIPELINE UNDER MS CHIN'S LEADERSHIP CADRE HAS SUCCESSFULLY INFLUENCED POLICY AT THE LOCAL SCHOOL DISTRICT LEVEL AND IS MOVING TOWARDS ADDRESSING STATE AND NATIONAL POLICIES USING THE HUMAN RIGHTS FRAMEWORK RECENTLY IN FEBRUARY 2007, CADRE'S PARENT-LED RIGHT TO EDUCATION CAMPAIGN ACHIEVED A MAJOR VICTORY WHEN ITS HUMAN RIGHTS DOCUMENTATION, PEOPLE'S HEARING, ADVOCACY, AND MEDIA WORK SIGNIFICANTLY HELPED ENSURE THE LOS ANGELES UNIFIED SCHOOL DISTRICT'S PASSAGE OF A NEW DISTRICT-WIDE SCHOOL DISCIPLINE POLICY BASED ON POSITIVE BEHAVIOR SUPPORT THIS SUCCESS HAS POSITIONED CADRE'S GRASSROOTS PARENT LEADERS TO EXERT LEADERSHIP IN BROADER HUMAN RIGHTS/SOCIAL JUSTICE MOVEMENT BUILDING IN MULTIPLE POLICY ARENAS MS CHIN IS A NATIVE CALIFORNIAN AND CHILD OF CHINESE IMMIGRANTS SHE HAS BEEN PART OF THE EDUCATIONAL AND SOCIAL JUSTICE MOVEMENT FOR 16 YEARS, DEDICATED TO FIGHTING INSTITUTIONAL RACISM BY PROTECTING AND TRANSFORMING PUBLIC EDUCATION IN LOW-INCOME NEIGHBORHOODS OF COLOR SHE ALSO HAS 18 YEARS OF EXPERIENCE IN FACILITATION, TRAINING, AND ORGANIZATIONAL DEVELOPMENT MS CHIN HOLDS BOTH A BACHELORS OF ARTS IN HISTORY AND A MASTERS OF ARTS IN URBAN PLANNING COMMUNITY DEVELOPMENT FROM THE UNIVERSITY OF CALIFORNIA, LOS ANGELES IN ADDITION TO DIRECTING CADRE, MS CHIN IS ALSO AN INDEPENDENT CONSULTANT AND SERVES ON THE BOARD OF DIRECTORS OF JUSTICE MATTERS, A NATIONAL RACIAL JUSTICE POLICY AND RESEARCH ORGANIZATION BASED IN SAN FRANCISCO, CALIFORNIA JACKIE JENKINS-SCOTT ON JULY 1, 2004, JACKIE JENKINS-SCOTT BECAME THE 13TH PART II, SECTION C, LINE 17A, PRESIDENT OF WHEELOCK COLLEGE, A PRIVATE COLLEGE WITH A MISSION TO IMPROVE FACTS AND CIRCUMSTANCES THE LIVES OF CHILDREN AND FAMILIES MS JENKINS-SCOTT RECEIVED HER BS DEGREE FROM EASTERN MICHIGAN UNIVERSITY, A MASTERS OF SOCIAL WORK FROM BOSTON UNIVERSITY SCHOOL OF SOCIAL WORK, AND COMPLETED A POST GRADUATE RESEARCH FELLOWSHIP AT RADCLIFFE COLLEGE IN 2003, MS JENKINS-SCOTT RECEIVED AN HONORARY DOCTORATE DEGREE IN EDUCATION FROM WHEELOCK COLLEGE WHEN SHE SERVED AS THE COMMENCEMENT SPEAKER IN ADDITION TO WHEELOCK, SHE HOLDS HONORARY DOCTORATE DEGREES FROM SUFFOLK UNIVERSITY, NORTHEASTERN UNIVERSITY, BENTLEY COLLEGE AND MOUNT IDA COLLEGE FRÓM 1983 UNTIL 2004, MS JENKINS-SCOTT SERVED AS THE PRESIDENT AND CHIEF EXECUTIVE OFFICER OF THE DIMOCK COMMUNITY HEALTH CENTER IN ROXBURY, MASSACHUSETTS PRIOR TO JOINING DIMOCK, SHE HELD SEVERAL POSITIONS WITH THE COMMONWEALTH OF MASSACHUSETTS, DEPARTMENTS OF PUBLIC AND MENTAL HEALTH AS A COMMUNITY LEADER, PUBLIC HEALTH ADVOCATE AND INNOVATIVE ADMINISTRATOR, SHE HAS BEEN A NATIONALLY KNOWN FIGURE FOR NEARLY THIRTY YEARS MS JENKINS-SCOTT HAS SERVED ON MANY PROFESSIONAL, CIVIC AND COMMUNITY BOARDS AND COMMITTEES SHE CURRENTLY SERVES ON THE BOARD OF DIRECTORS OF THE BOSTON FOUNDATION, THE KENNEDY LIBRARY FOUNDATION AND MUSEUM, THE BOSTON PLAN FOR EXCELLENCE AND WGBH SHE ALSO SERVES ON THE BOARD OF DIRECTORS OF CENTURY BANK AND TRUST COMPANY AND THE TUFTS HEALTH PLAN IN APRIL 2007, BOSTON'S MAYOR THOMAS M MENINO SELECTED MS JENKINS-SCOTT TO CO-CHAIR HIS SCHOOL READINESS ACTION PLANNING TEAM, CHARGED WITH DEVELOPING SPECIFIC STRATEGIES TO PREVENT THE ACHIEVEMENT GAP AMONG THE NEXT GENERATION OF STUDENTS MS JENKINS-SCOTT WAS ASKED BY GOVERNOR DEVAL L PATRICK TO CO-CHAIR THE 'READINESS PROJECT', THE GROUP RESPONSIBLE FOR DEVELOPING A 10-YEAR STRATEGIC PLAN TO IMPLEMENT THE VISION FOR EDUCATION IN THE COMMONWEALTH OF MASSACHUSETTS AS OUTLINED BY GOVERNOR PATRICK IN A JUNE 2007 SPEECH MS JENKINS-SCOTT HAS RECEIVED NUMEROUS AWARDS AND CITATIONS INCLUDING THE 2005 ASSOCIATED INDUSTRIES OF MASSACHUSETTS LEGACY OF LEADERSHIP AWARD, 2004 PINNACLE LIFETIME

ACHIEVEMENT AWARD FROM THE GREATER BOSTON CHAMBER OF COMMERCE AND THE 2004 DISTINGUISHED ALUMNI AWARD FROM BOSTON UNIVERSITY PART II, SECTION C, LINE 17A, ALVIN LOUIS STARKS ALVIN LOUIS STARKS IS A PROGRESSIVE RACIAL JUSTICE FACTS AND CIRCUMSTANCES RESEARCHER AND ADVOCATE WHO WORKS IN PHILANTHROPY AND CIVIL RIGHTS ADVOCACY TO ADDRESS ISSUES OF SYSTEMIC INEQUALITY ALVIN'S VISIONARY TEST ( LEADERSHIP AND INNOVATIVE PHILANTHROPIC RESEARCH SUPPORTS A NEW GENERATION OF IDEAS AND ORGANIZATIONS TO EXPLORE THE INTERSECTIONS OF HUMAN RIGHTS, RACIAL JUSTICE, CROSS MOVEMENT BUILDING AND GENDER EQUITY ALVIN HAS WRITTEN NUMEROUS REPORTS AND STRATEGY PAPERS FOR DONORS AND FOUNDATIONS EXPLORING PROGRESSIVE ACTIVITIES TO STRENGTHEN SOCIAL CHANGE ALVIN HAS AN EXTENSIVE PHILANTHROPIC BACKGROUND THAT HAS GRANTED HIM THE UNIQUE PRIVILEGE TO WORK AT SEVERAL LEADING FOUNDATIONS FOR OVER EIGHT YEARS, ALVIN WORKED AT THE OPEN SOCIETY INSTITUTE AND IN 2004 CREATED AND DIRECTED THE OPEN SOCIETY INSTITUTE'S RACIAL JUSTICE INITIATIVE BEFORE JOINING OSI, ALVIN HELD THE POSITION OF SENIOR PROGRAM OFFICER FOR RACIAL JUSTICE AND GENDER IDENTITY AT THE ARCUS FOUNDATION THERE HIS WORK FOCUSED ON BUILDING THE FOUNDATION'S MISSION TO ADVANCE THE INTERSECTIONS OF RACE, SEXUALITY AND GENDER IDENTITY ALVIN WORKED WITH THE NATIONAL NAACP TO ENCOURAGE NEW PROGRESSIVE ADVOCACY AND BUILD PHILANTHROPIC ENGAGEMENT, AND SERVED WITH THE W K KELLOGG FOUNDATION AS THEIR PROGRAM OFFICER FOR RACIAL EQUITY ALVIN RECEIVED HIS FORMAL EDUCATION FROM THE STATE UNIVERSITY OF NEW YORK AND COLUMBIA UNIVERSITY IN NEW YORK CITY HE SITS ON SEVERAL NON-PROFIT BOARDS ANTONIA DARDER DR ANTONIA DARDER IS AN INTERNATIONALLY RECOGNIZED CRITICAL SCHOLAR SHE HOLDS THE LEAVEY PRESIDENTIAL CHAIR OF ETHICS AND MORAL LEADERSHIP AT LOYOLA MARYMOUNT UNIVERSITY, LOS ANGELES AND IS PROFESSOR EMERITA OF EDUCATION POLICY, ORGANIZATION AND LEADERSHIP AT THE UNIVERSITY OF ILLINOIS URBANA CHAMPAIGN HER SCHOLARSHIP FOCUSES ON ISSUES OF RACISM, POLITICAL ECONOMY, EDUCATION, SOCIAL JUSTICE, AND SOCIETY ANTONIA IS THE AUTHOR OF CULTURE AND POWER IN THE CLASSROOM AND REINVENTING PAULO FREIRE PEDAGOGY OF LOVE, NAMED OUTSTANDING BOOK IN CURRICULUM FOR 2001-2002 BY THE AMERICAN EDUCATIONAL RESEARCH ASSOCIATION SHE IS ALSO CO-AUTHOR OF AFTER RACE RACISM AFTER MULTICULTURALISM SHE IS THE EDITOR OF CULTURE AND DIFFERENCE AND CO-EDITOR OF LATINOS AND EDUCATION, THE LATINO STUDIES READER CULTURE, ECONOMY AND SOCIETY, AND THE CRITICAL PEDAGOGY READER, CONSIDERED A PREMIER TEXT FOR ITS USE IN FOUNDATIONS COURSES THIS YEAR, THE 20TH ANNIVERSARY EDITION OF CULTURE AND POWER IN THE CLASSROOM WAS RELEASED, AS WELL AS A DISSIDENT VOICE ESSAY ON CULTURE, PEDAGOGY, AND POWER, A TWENTY YEAR RETROSPECTIVE OF HER WRITINGS, WHICH INCLUDES HER POETRY BEYOND HER SCHOLARLY EFFORTS, ANTONIA IS AN ACTIVIST AND VISUAL ARTIST, WHO HAS PARTICIPATED IN A VARIETY OF GRASSROOTS EFFORTS TIED TO EDUCATIONAL RIGHTS, WORKER'S RIGHTS, BILINGUAL EDUCATION, WOMEN'S ISSUES, ENVIRONMENTAL JUSTICE, AND IMMIGRANT RIGHTS IN THE 1990S, SHE CONVENED EDUCATORS FROM ACROSS THE STATE TO ESTABLISH THE CALIFORNIA CONSORTIUM OF CRITICAL EDUCATORS (CCCE), A MEMBER SUPPORTED RADICAL TEACHERS ORGANIZATION COMMITTED TO AN EDUCATIONAL VISION OF SCHOOLING INTIMATELY LINKED TO SOCIAL JUSTICE, HUMAN RIGHTS, AND ECONOMIC DEMOCRACY IN 2005, SHE ESTABLISHED A RADIO COLLECTIVE WITH STUDENTS AND COMMUNITY MEMBERS WHO PRODUCED LIBERACIONI, A PUBLIC AFFAIRS RADIO PROGRAM ON WEFT AS A MEMBER OF THE CHAMPAIGN URBANA INDEPENDENT MEDIA CENTER, SHE WAS ACTIVE AS A COMMUNITY JOURNALIST WITH THE PUBLIC I IN 2007, SHE WORKED WITH GRADUATE STUDENTS ON AN AWARD WINNING DOCUMENTARY, BREAKING SILENCE THE PERVASIVENESS OF OPPRESSION THAT EXAMINED THE PERSISTENCE OF INEQUALITY AT THE UNIVERSITY ANTONIA WAS BORN IN PUERTO RICO AND RAISED IN EAST LOS ANGELES AS A YOUNG SINGLE MOTHER OF THREE CHILDREN AND LIVING ON WELFARE, SHE COMPLETED HER STUDIES IN NURSING AT PASADENA CITY COLLEGE SHE ATTENDED CALIFORNIA STATE UNIVERSITY LOS ANGELES AND THEN PACIFIC OAKS COLLEGE WHERE SHE STUDIED HUMAN DEVELOPMENT WITH A FOCUS ON MARRIAGE AND FAMILY THERAPY SHE EARNED HER DOCTORAL DEGREE IN PHILOSOPHY OF EDUCATION FROM CLAREMONT GRADUATE UNIVERSITY ANTONIA'S SCHOLARSHIP HAS BEEN DEEPLY INFLUENCED BY HER ACQUAINTANCE WITH RENOWNED BRAZILIAN EDUCATOR PAULO FREIRE, WHOSE IDEAS ON SCHOOLING AND SOCIETY PROFOUNDLY SHAPED THE DIRECTION OF HER EARLY WORK TODAY, ANTONIA IS MOTIVATED TO PERSIST IN THE STRUGGLE FOR UNIVERSAL HUMAN RIGHTS BY HER FOUR GRANDDAUGHTERS AND THE OTHER CHILDREN OF OUR TIME, WHO WILL BE FORCED TO CONTEND WITH WORLD WE WILL LEAVE BEHIND GERARD LEEDS GERARD LEEDS IS A CO-FOUNDER AND MEMBER OF THE BOARD OF DIRECTORS OF THE INSTITUTE FOR STUDENT ACHIEVEMENT, INC, WHICH HE FOUNDED WITH HIS WIFE, LILO, IN 1990 IN 1971, PRIOR TO ESTABLISHING THE INSTITUTE, GERARD AND LILO LEEDS FOUNDED CMP MEDIA INC , A MAJOR PUBLISHER OF BUSINESS NEWSPAPERS, MAGAZINES, INTERNET AND OTHER INFORMATION SERVICES FOR THE HIGH-TECH INDUSTRIES THE COMPANY'S SOCIALLY RESPONSIBLE POLICIES PLACED IT IN FORTUNE MAGAZINE AS ONE OF THE 100 BEST COMPANIES TO WORK FOR, AND IN WORKING MOTHER, AS ONE OF THE BEST COMPANIES FOR WOMEN WORKERS THE COMPANY INSTITUTED A MAJOR ON-SITE CHILDCARE CENTER, A STRONG DIVERSITY PROGRAM, AND AN ACTIVE EMPLOYEE-RUN FOUNDATION IN 1988, GERARD AND LILO LEEDS TRANSFERRED THE MANAGEMENT OF THE COMPANY TO THE NEXT GENERATION AND MICHAEL LEEDS TOOK OVER AS PRESIDENT AND CEO THE LEEDS MADE THE CHALLENGE OF EDUCATING CHILDREN AT RISK THEIR PRINCIPAL FOCUS IN ADDITION TO FOUNDING THE INSTITUTE FOR STUDENT ACHIEVEMENT, THEY ARE ON THE BOARDS OF SEVERAL OTHER ORGANIZATIONS WORKING ON EDUCATION ISSUES THESE INCLUDE THE ALLIANCE FOR EXCELLENT EDUCATION, LOCATED IN WASHINGTON, DC, WHOSE GOAL IS TO MAKE EXCELLENT EDUCATION FOR ALL CHILDREN A REALITY, AND THE THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION IN BOSTON, WHICH FOCUSES ON EARLY CARE IN EDUCATION AND FUNDING FOR QUALITY EDUCATION GERARD AND LILO LEEDS ARE BOTH IMMIGRANTS TO THE UNITED STATES, AND CONSIDER THEIR WORK IN EDUCATION A WAY TO RETURN TO SOCIETY SOME OF THE BUSINESS AND PERSONAL SUCCESS THAT AMERICA HAS ALLOWED THEM TO ACHIEVE GERARD AND LILO LEEDS ARE RECIPIENTS OF A LARGE NUMBER OF CIVIC AWARDS, INCLUDING SOCIALLY RESPONSIBLE ENTREPRENEURS OF THE YEAR, LIA HUMANITARIAN AWARD, OUTSTANDING PHILANTHROPISTS OF THE YEAR FOR NSFRE/LI , WERE HONORED BY THE URBAN LEAGUE OF LI , THE NYS CHAPTER OF NAACP, THE NYS UNITED TEACHERS ASSOCIATION, AND THE AMERICAN JEWISH COMMITTEE THEY WERE CITED BY NEWSDAY IN ITS REPORT ON "100 WHO SHAPED A CENTURY" MR LEEDS HOLDS A BACHELOR OF ARTS AND SCIENCE AND AN HONORARY DOCTORATE FROM ADELPHI UNIVERSITY, AND A MASTERS OF ARTS AND AN HONORARY DOCTORATE FROM THE STATE UNIVERSITY OF NEW YORK AT STONYBROOK HE HAS TAUGHT MANAGEMENT AT LONG ISLAND UNIVERSITY AND HOFSTRA UNIVERSITY, AND LECTURES ANNUALLY TO MBA STUDENTS ON SOCIALLY RESPONSIBLE BUSINESS MANAGEMENT DEBORAH LABELLE DEBORAH LABELLE IS AN ATTORNEY, PROFESSOR, WRITER AND ADVOCATE WHO FOCUSES ON THE APPLICATION OF HUMAN RIGHTS FOR MARGINALIZED COMMUNITIES SHE HAS BEEN LEAD COUNSEL IN OVER A DOZEN CLASS ACTIONS THAT HAVE SUCCESSFULLY CHALLENGED POLICIES AFFECTING THE TREATMENT OF INCARCERATED MEN, WOMEN AND JUVENILES AND THEIR FAMILIES MS LABELLE IS A SENIOR SOROS JUSTICE FELLOWAND, THE FIRST AMERICAN RECOGNIZED BY HUMAN RIGHTS WATCH AS A HUMAN RIGHTS MONITOR IN ADDITION TO HER PRIVATE PRACTICE, SHE IS DIRECTOR OF THE AMERICAN CIVIL LIBERTIES UNION'S JUVENILE LIFE WITHOUT PAROLE INITIATIVE HER PUBLICATIONS INCLUDE WOMEN AT THE MARGINS, NEGLECT,PUNISHMENT AND RESISTANCE (HAWORTH, 2002) ENSURING RIGHTS FOR ALL REALIZING HUMAN RIGHTS FOR PRISONERS IN BRINGING HUMAN RIGHTS HOME (PRAEGER PRESS, 2008), AND BRINGING HUMAN RIGHTS HOME TO THE WORLD OF DETENTION (COLUMBIA HUMAN RIGHTS LAW REVIEW ARTICLE, VOL 40 1, FALL 2008) MS LABELLE IS A RECIPIENT OF MICHIGAN'S STATE BAR CHAMPION OF JUSTICE AWARD, RECOGNIZED AS ONE OF MICHIGAN'S TOP LAWYERS AND RECEIVED THE NATIONAL TRIAL LAWYER OF THE YEAR AWARD FROM THE PUBLIC INTEREST FOUNDATION (2008) AND NATIONAL LAWYER GUILD'S LAW FOR THE PEOPLE AWARD (2008) SHE RECEIVED THE WADE HAMPTON MCCREE JR AWARD FOR THE ADVANCEMENT OF SOCIAL JUSTICE PRESENTED BY THE FEDERAL BAR (2009) AND THE SUSAN B ANTHONY AWARD FROM THE UNIVERSITY OF MICHIGAN (2010) 4 PUBLIC PARTICIPATION IN PROGRAMS OR POLICIES TREAS REG 1 170A-9(F)(3)(VI) BY DISSEMINATING ITS RESEARCH THROUGH PUBLICATIONS AND CONFERENCES, THE SCHOTT FOUNDATION SHARES ITS SCHOLARSHIP AND POLICY RECOMMENDATIONS REGARDING PUBLIC EDUCATION IN THIS COUNTRY IN THE HOPE OF CLOSING THE OPPORTUNITY GAP TO ENSURE THAT ALL CHILDREN HAVE EQUAL ACCESS TO A HIGH QUALITY PRE-K THROUGH 12TH GRADE EDUCATION TREAS REG 1 170A-9(F)(3)(VI)(B) PROVIDES THAT "AN ORGANIZATION [THAT] IS AN EDUCATIONAL OR RESEARCH INSTITUTION WHICH REGULARLY PUBLISHES SCHOLARLY STUDIES THAT ARE WIDELY USED BY COLLEGES AND UNIVERSITIES OR BY MEMBERS OF THE GENERAL PUBLIC WILL ALSO BE CONSIDERED EVIDENCE THAT SUCH ORGANIZATION IS "PUBLICLY SUPPORTED "

PART II, SECTION C, LINE 17A, FACTS AND CIRCUMSTANCES TEST ( FURTHERMORE, TREAS REG 1 170A-9(F)(3)(VI)(C) PROVIDES THAT "THE PARTICIPATION IN, OR SPONSORSHIP OF, THE PROGRAMS OF THE ORGANIZATION BY MEMBERS OF THE PUBLIC HAVING SPECIAL KNOWELDGE OR EXPERTISE, PUBLIC OFFICEALS, OR CIVIC OR COMMUNITY LEADERS" WILL BE CONSIDERED EVIDENCE THAT AN ORGANIZATION IS "PUBLICLY SUPPORTED " THE FOUNDATION CLEARLY MEETS BOTH OF THESE STANDARDS FOR EXAMPLE, FROM NOVEMBER 5-7, 2009, THE FOUNDATION HOSTED ITS 2ND ANNUAL OPPORTUNITY TO LEARN SUMMIT, ENTITLTED "BUILDING A NATIONAL MOVEMENT TO CLOSE THE OPPORTUNITY GAP " THE SUMMIT WAS DESIGNED TO PROVIDE A PLATFORM FOR PHILANTHROPIC PARTNERS, GRASSROOTS COMMUNITY ADVOCATES, FEDERAL AND STATE POLICYMAKERS, YOUTH ORGANIZERS AND RESEARCHERS TO SHARE CRITICAL ADVOCACY STRATEGIES, FUNDING APPROACHES AND NETWORKS TO BUILD A STATE AND NATIONAL MOVEMENT TO PROVIDE ALL STUDENTS AN OPPORTUNITY TO LEARN FEATURED SPEAKERS INCLUDED GOVERNMENT OFFICIALS (RUSSLYN ALI, ASSISTANT SECRETARY FOR CIVIL RIGHTS, US DEPARTMENT OF EDUCATION, CONGRESSMAN CHAKA FATTAH, US HOUSE OF REPRESENTATIVES), PROMINENT COMMUNITY LEADERS (STEPHANIE ELAM, ANCHOR, CNN, CHARLES OGLETREE, HARVARD LAW SCHOOL PROFESSOR OF LAW), LEADERS IN THE PHILANTHROPIC COMMUNITY (GAIL CHRISTOPHER, VICE PRESIDENT FOR PROGRAMS, WK KELLOGG FOUNDATION, DR FRED FRELOW, EDUCATION AND SCHOLARSHIP PROGRAM OFFICER, FORD FOUNDATION) AND EDUCATION LEADERS (DR LINDA DARLING HAMMOND, PROFESSOR OF EDUCATION, STANFORD UNIVERSITY, JOHN STOCKS, DEPUTY EXECUTIVE DIRECTOR, NATIONAL EDUCATION ASSOCIATION) A REVIEW OF THE FOUNDATION'S WEBSITE REVEALS NUMEROUS PUBLICATIONS AND REPORTS, AVAILABLE IN PDF FORMAT FOR ANY INTERESTED READER TO DOWNLOAD, IN THE FOLLOWING CATEGORIES \* OPPORTUNITY TO LEARN (E G , LOST OPPORTUNITY A 50-STATE REPORT ON THE OPPORTUNITY TO LEARN IN AMERICA, PUBLISHED IN MAY 2009) \* A POSITIVE FUTURE FOR BLACK BOYS (E.G., GIVEN HALF A CHANCE THE SCHOTT 50 STATE REPORT ON PUBLIC EDUCATION FOR BLACK MALES, PUBLISHED IN JULY 2008) \* THE SCHOTT FELLOWSHIP ON EARLY CARE AND EDUCATION (E G , ENSURING HIGH QUALITY EARLY EDUCATION FOR ALL CHILDREN IN THE COMMONWEALTH OF MASSACHUSETTS, PUBLISHED IN JUNE 2005) \* PUBLIC POLICY AND LEADERSHIP (E G , PEER-LED PROFESSIONAL DEVELOPMENT FOR EQUITY AND DIVERSITY A REPORT FOR TEACHERS AND ADMINISTRATORS BASED ON FINDINGS FROM THE SEED PROJECT, PUBLISHED IN MAY 2007) \* GENDER EQUITY (E.G., KEEPING SCORE GIRLS' PARTICIPATION IN HIGH SCHOOL ATHLETICS IN MASSACHUSETTS, PUBLISHED IN FEBRUARY 2004) THE FOUNDATION ALSO SERVES ITS MISSION BY MAKING GRANTS TO PUBLIC CHARITIES THAT PROMOTE EQUITY IN EDUCATION RECENT GRANTEES INCLUDE THE DONOR'S EDUCATION COLLABORATIVE (DEC) IS A JOINT GRANTMAKING EFFORT THAT SUPPORTS COMMUNITY ENGAGEMENT AROUND KEY POLICY REFORMS TO ATTAIN AN EQUITABLE NEW YORK CITY PUBLIC SCHOOL SYSTEM AND MAKE IT RESPONSIVE TO THE NEEDS OF ALL CHILDREN THIS GRANT PROVIDES FUNDS TO DEC TO CONTINUE ITS GRANTMAKING OPERATIONS TO SUPPORT ORGANIZATIONS THAT USE CONSTITUENCY BUILDING AND RESEARCH TO ADVOCATE FOR SYSTEMIC CHANGES THAT IMPROVE TEACHING EFFECTIVENESS, INCREASE COLLEGE READINESS, AND SUPPORT THE DEVELOPMENT OF A LEARNING COMMUNITY RURAL COMMUNITY ALLIANCE (RCA) IS A MEMBERSHIP BASED ORGANIZATION OF PARENTS, COMMUNITY MEMBERS, YOUTH, EDUCATORS, LOCAL BUSINESS OWNERS, LOCAL ELECTED OFFICIALS, AND STATE POLICY MAKERS OPERATING IN RURAL ARKANSAS THE COMMON PURPOSE OF MEMBERS IS TO CREATE A PROSPEROUS FUTURE FOR RURAL AND COMMUNITY SCHOOLS BY INCREASING THEIR ABILITY TO ADVOCATE, THEIR AWARENESS ON THE IMPORTANCE OF RURAL SCHOOLS, AND HELPING THEM TO UNITE THEIR VOICES ON STATE-WIDE INITIATIVES MASSACHUSETTS BUDGET AND POLICY CENTER (MBPC) IS AN ORGANIZATION THAT ANALYZES BUDGETS AND TAXES FROM A PROGRESSIVE PERSPECTIVE MBPC PROVIDES TO THE PUBLIC, GRASSROOTS, AND ADVOCACY GROUPS HELPFUL INFORMATION AND ANALYSIS OF STATE ECONOMIC POLICIES AND HELPS ENSURE THAT THE IMPACT OF POLICY CHOICES ON LOW AND MODERATE INCOME RESIDENTS IS FRONT AND CENTER IN THE PUBLIC DEBATE THIS GRANT SUPPORTS THE CREATION OF A MEMO ON OPTIONS TO GENERATE REVENUE FOR BUILDING EDUCATIONAL SYSTEMS THAT PROVIDE EVERY CHILD WITH A MEANINGFUL OPPORTUNITY TO LEARN SCHOTT'S OTL NETWORK EMPLOYS THE FOUR RESOURCING STRATEGIES TO UNITE A COALITION OF ADVOCATES AND ORGANIZERS FROM ACROSS THE COUNTRY TO ENSURE THAT ALL STUDENTS HAVE ACCESS TO HEALTHY LIVING AND LEARNING COMMUNITIES AND AN OPPORTUNITY TO LEARN BUILDING ON OTL'S SUCCESS, THE HLLC INITIATIVE REPRESENTS THE NEXT PHASE OF THE SCHOTT FOUNDATION'S EDUCATION JUSTICE AND OPPORTUNITY STRATEGY THROUGH SCHOTT'S NATIONAL EFFORTS AND OTL NETWORK, OVER 25 CITIES AND COMMUNITIES ACROSS THE NATION WILL BE ENGAGED IN THE HLLC INITIATIVE SCHOTT ACCOMPLISHMENTS IN RECENT YEARS INCLUDE  $\,^*$  THE CO-FOUNDING OF THE ALLIANCE TO RECLAIM OUR SCHOOLS (AROS), A DYNAMIC NEW ALLIANCE BRINGING TOGETHER GROUPS REPRESENTING PARENTS, STUDENTS, COMMUNITY ORGANIZATION, AND LABOR TO FIGHT FOR EDUCATIONAL JUSTICE AND EQUITABLE ACCESS \* SUCCESSFUL LAUNCH OF SCHOTT'S FIFTH BLACK MALE REPORT CARD, BLACK LIVES MATTER THE SCHOTT 50 STATE REPORT ON PUBLIC EDUCATION AND BLACK MALES THE SITE HAS RECEIVED OVER 60,000 VISITS SINCE THE REPORT LAUNCHED IN FEBRUARY 2015  $\,\,^*$  THE OCTOBER 2015 SCHOTT AND THE AMERICAN FEDERATION OF TEACHERS'S (AFT) OPPORTUNITY TO LEARN (OTL) CONFERENCE, ADVANCING RACIAL JUSTICE IN 2015 HOW COMMUNITIES AND LABOR CAN ORGANIZE TOGETHER CONVENED IN NEW ORLEANS THE CONFERENCE BROUGHT TOGETHER OVER 650 REPRESENTATIVES FROM LABOR, EDUCATIONAL JUSTICE (YOUNG PEOPLE, PARENTS, EDUCATORS, AND COMMUNITY STAKEHOLDERS), THE MOVEMENT FOR BLACK LIVES MATTER, LIVING WAGE/ECONOMIC JUSTICE, AND IMMIGRATION REFORM \* SCHOTT, WITH OTHER PARTNERS LIKE OSF, SUCCESSFULLY RAISED THE PROFILES OF BLACK AND OTHER GIRLS OF COLOR THAT HAVE BEEN LARGELY IGNORED IN THE SCHOOL DISCIPLINE CONVERSATION \* IN MISSISSIPPI, SCHOTT IS PARTNERING WITH ONE VOICE MS AND "BETTER SCHOOLS, BETTER JOBS" TO MOBILIZE AROUND BALLOT INITIATIVE 42, WHICH IF PASSED IN NOVEMBER 2015, WILL AMEND SECTION 201 OF THE CONSTITUTION, REQUIRING THE STATE TO PROVIDE (AND THE LEGISLATURE TO FUND) AN ADEQUATE AND EFFICIENT SYSTEM OF FREE PUBLIC SCHOOLS AND WILL PROTECT EACH CHILD'S FUNDAMENTAL RIGHT TO EDUCATIONAL OPPORTUNITY THROUGH 12TH GRADE \* IN THE PAST TWELVE MONTHS, WITH SCHOTT'S LEADERSHIP, THE EDUCATIONAL JUSTICE NETWORK (EJN) HAS GROWN AND IS CREATING A BODY OF WORK THAT WE BELIEVE WILL ALIGN IN A SIGNIFICANT AND POWERFUL WAY WITH EDUCATION JUSTICE ORGANIZATIONS \* WORKED TO ASSIST GRANTEES WITH LOCAL AND STATE POLICY REFORMS IN THE BILL INTRODUCED IN NEW YORK STATE (SSS-NYA 8396) THAT WILL REDUCE SCHOOL SUSPENSIONS AND PROMOTE A POSITIVE SCHOOL CLIMATE, CULTIVATING AN ENVIRONMENT WHERE TEACHERS CAN TEACH AND STUDENTS CAN LEARN \* PARTICIPATED IN SCHOOL DISCIPLINE CONVENINGS IN PARTNERSHIP WITH THE US DEPARTMENT OF EDUCATION, THE US DEPARTMENT OF JUSTICE, AND THE WHITE HOUSE Schedule A (Form 990 or 990-EZ) 2014 DLN: 93493132025796

#### OMB No 1545-0047

Open to Public Inspection

#### **SCHEDULE C** (Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

# **Political Campaign and Lobbying Activities**

For Organizations Exempt From Income Tax Under section 501(c) and section 527 ▶ Complete if the organization is described below. ▶ Attach to Form 990 or Form 990-EZ. ► Information about Schedule C (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

If the organization answered "Yes" to Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations. Complete Parts I-A and C below. Do not complete Part I-B
- Section 527 organizations Complete Part I-A only

If the organization answered "Yes" to Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered "Yes" to Form 990, Part IV, Line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V,

line 35c (Proxy Tax) (see separate instructions), then ◆ Section 501(c)(4), (5), or (6) organizations Complete Part III

	me of the organization ESCHOTT FDTN FOR PUBLIC EDUCATIO	N		Emplo	yer iden	itirication number
				04-34	57065	
Par	t I-A Complete if the or	ganization is exempt under	section 501(	c) or is a section	n 527	' organization.
1	Provide a description of the or	ganızatıon's dırect and ındırect politi	cal campaign act	ıvıtıes ın Part IV		
2	Political expenditures				<b>&gt;</b>	\$
3	V olunteer hours					
Par	t I-B Complete if the or	ganization is exempt under	section 501(	c)(3).		
1	Enter the amount of any excise	e tax incurred by the organization un	der section 4955		•	\$
2	Enter the amount of any excise	e tax incurred by organization manag	ers under section	14955	•	\$
3	If the organization incurred a s		☐ Yes ☐ No			
4a	Was a correction made?					┌ Yes ┌ No
b	If "Yes," describe in Part IV					
Par	t I-C Complete if the or	ganization is exempt under	section 501(	c), except sect	ion 50	1(c)(3).
1	Enter the amount directly expe	ended by the filing organization for se	ction 527 exemp	t function activitie	s 🕨	\$
2	Enter the amount of the filing of exempt function activities	organization's funds contributed to ot	her organizations	for section 527	<b>.</b>	\$
3	Total exempt function expendi	¢				
4	Did the filing organization file <b>F</b>	↑ — Yes				
5	Enter the names, addresses are organization made payments of amount of political contribution separate segregated fund or a	funds Also enter the anization, such as a				
	(a) Name	<b>(b)</b> Address	<b>(c)</b> EIN	(d) A mount pai filing organizat funds If none, er	ion's	(e) A mount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0-
For D	anerwork Reduction Act Notice se	ee the instructions for Form 990 or 990	1-F7 c	at No E0004C Cab	dl ~ C /	Form 000 or 000-E7\ 2014

section 4911 tax for this year?

┌ Yes ┌ No

## Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A Check ► If the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures)
- B Check ► If the filing organization checked box A and "limited control" provisions apply

	Limits on Lobbying E (The term "expenditures" means a			(a) Filing organization's totals	<b>(b)</b> Affiliated group totals
a	Total lobbying expenditures to influence public of	opinion (grass roots lobbying)		35,000	
b	Total lobbying expenditures to influence a legisl	ative body (direct lobbying)		0	
c	Total lobbying expenditures (add lines 1a and 1	b)		35,000	
d	Other exempt purpose expenditures			4,403,875	
e	Total exempt purpose expenditures (add lines 1	c and 1d)		4,438,875	
f	Lobbying nontaxable amount Enter the amount columns	from the following table in both		371,944	
	If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:			
	Not over \$500,000	20% of the amount on line 1e			
	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000			
	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000			
	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000			
	Over \$17,000,000	\$1,000,000			
g	Grassroots nontaxable amount (enter 25% of lir	ne 1f)		92,986	
h	Subtract line 1g from line 1a If zero or less, ent	er -0 -		0	
i	Subtract line 1f from line 1c If zero or less, ente	er - 0 -		0	
j	If there is an amount other than zero on either li	ne 1h or line 1i, did the organization file Form 47	720 rei	porting	

# 4-Year Averaging Period Under section 501(h) (Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

	Lobbying Expenditures During 4-Year Averaging Period							
	Calendar year (or fiscal year beginning in)	(a) 2011	<b>(b)</b> 2012	<b>(c)</b> 2013	( <b>d)</b> 2014	<b>(e)</b> Total		
2a	Lobbying nontaxable amount	390,072	373,685	345,909	371,944	1,481,610		
b	Lobbying ceiling amount (150% of line 2a, column(e))					2,222,415		
_c	Total lobbying expenditures	75,000	50,000	54,100	35,000	214,100		
_d	Grassroots nontaxable amount	97,518	93,421	86,477	92,986	370,402		
_e	Grassroots ceiling amount (150% of line 2d, column (e))					555,603		
f	Grassroots lobbying expenditures	40,000	35,000	· ·	35,000	149,100		

(b) Amount	No
Amount	No
-	
-	
or section	)(5), o
Yes	
1	
2	
3	
or section	
Part III-	R (b)
[-A, lines 1 a	Part II
I	Part I

Part IV Supplemental Info	ormation (continued)
Return Reference	Explanation

Schedule C (Form 990 or 990EZ) 2014

efile GRAPHIC print - DO NOT PROCESS | As Filed Data -

DLN: 93493132025796

OMB No 1545-0047

**SCHEDULE D** (Form 990)

Department of the Treasury

► Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

**Supplemental Financial Statements** 

► Attach to Form 990.

Information about Schedule D (Form 990) and its instructions is at <a href="https://www.irs.gov/form990">www.irs.gov/form990</a>.

Open to Public Inspection

tema	al Revenue Service	Information about Schedule D (Form	n 990) and its instructions is at <u>www.i.</u>	rs.gov/	<u>form990</u> . Inspection
	me of the organ	iization R PUBLIC EDUCATION		Emp	ployer identification number
- 11	L SCHOTT IDIN POI	N TODEC EDOCATION		04-	3457065
ć		nizations Maintaining Donor Adv		Funds	or Accounts. Complete if the
_	organı	zation answered "Yes" to Form 990	<del>`</del>	-	(I) Funda and atheres accords
	Tatal number a	at and af year	(a) Donor advised funds		(b) Funds and other accounts
	Total number a	ue of contributions to (during year)			
		ue of grants from (during year)		_	
		ue at end of year			
		zation inform all donors and donor adviso	L	nor adv	ısad
	funds are the o	organization's property, subject to the or	ganization's exclusive legal control?		ΓYes ΓN∈
	used only for c	zation inform all grantees, donors, and d charitable purposes and not for the benef termissible private benefit?			
a		ervation Easements. Complete if	the organization answered "Yes"	to Forr	n 990, Part IV, line 7.
	Preservati Protection Preservati Complete lines	conservation easements held by the org on of land for public use (e g , recreation of natural habitat on of open space s 2a through 2d if the organization held a	or education)  Preservation of a Preservation of a	ı certifie	ed historic structure
	easement on t	he last day of the tax year			Held at the Find of the Very
1	Total number	of conservation easements		2a	Held at the End of the Year
,		restricted by conservation easements		2a 2b	
•	_	servation easements on a certified histo	oric structure included in (a)	20 2c	
			` ,		
	Number of conservation easements included in (c) acquired after $8/17/06$ , and not on a historic structure listed in the National Register				
		servation easements modified, transferr 	ed, released, extinguished, or termina	ted by th	he organization during
	Number of sta	tes where property subject to conservat	ion easement is located ►		
		nization have a written policy regarding to the conservation easements it holds?	the periodic monitoring, inspection, hai	ndling of	f violations, and <b>Yes N</b>
	Staff and volur	nteer hours devoted to monitoring, inspe	cting, and enforcing conservation ease	ements	during the year
		penses incurred in monitoring, inspecting	ı, and enforcıng conservatıon easemen	ts durın	g the year
		nservation easement reported on line 2(of 10)	d) above satisfy the requirements of se	ection 1	70(h)(4)(B)(ı) <b>Yes                                   </b>
	balance sheet	describe how the organization reports coi , and include, if applicable, the text of th on's accounting for conservation easeme	e footnote to the organization's financia		
1		nizations Maintaining Collection lete if the organization answered "Y		, or Ot	her Similar Assets.
1	works of art, h	ation elected, as permitted under SFAS 1 istorical treasures, or other similar asse de, in Part XIII, the text of the footnote t	ts held for public exhibition, education	, or rese	earch in furtherance of public
•	works of art, h	ition elected, as permitted under SFAS 1 istorical treasures, or other similar asse de the following amounts relating to thes	ts held for public exhibition, education		
	(i) Revenue in	ncluded in Form 990, Part VIII, line 1			<b>▶</b> \$
	(ii) Assets inc	luded in Form 990, Part X			<b>-</b> \$
	If the organiza	ntion received or held works of art, histor unts required to be reported under SFAS			
	Revenue inclu	ded in Form 990, Part VIII, line 1			<b>▶</b> \$
,		ed in Form 990, Part X			<u> </u>
	Maacta IIICIUU	ea mironni 220, Fail A			F P

Par <sup>.</sup>	Organizations Maintaining Co	llections of Art,	His	<u>torica</u>	<u>l Treasu</u>	res, or C	<u>)the</u>	<u>r Similar As</u>	sets	(continued)
3	Using the organization's acquisition, access collection items (check all that apply)	ion, and other record	s, ch	neck any	of the foll	owing that	are a	significant use	of its	
а	Public exhibition		d	Г	oan or excl	hange prog	rams			
b	Scholarly research		e	$\Gamma$ 0	ther					
c	Preservation for future generations									
4	Provide a description of the organization's copart XIII	ollections and explain	n hov	w they fo	ırther the o	rganızatıor	ı's ex	empt purpose	n	
5	During the year, did the organization solicit									
Day	assets to be sold to raise funds rather than to the sold to raise funds rather than to the sold to raise funds rather than to the sold to the sold to raise funds rather than the sold than the sold to raise funds rather than the sold t								┌ Yes	☐ No
Fal	Part IV, line 9, or reported an ar					i answere	u	es to rolling	,90,	
1a	Is the organization an agent, trustee, custod included on Form 990, Part X?					or other ass	sets r		┌ Yes	┌ No
b	If "Yes," explain the arrangement in Part XI	II and complete the f	ollov	wing tab	е	_				
								An	nount	
С	Beginning balance						1c			
d	Additions during the year						1d			
е	Distributions during the year					ļ	1e			
f	Ending balance						1f			
2a	Did the organization include an amount on F	orm 990, Part X, line	21,	for escr	ow or custo	odial accou	nt lıa	bility?	┌ Yes	┌ No
b	If "Yes," explain the arrangement in Part XI	II Check here if the	expla	anation	has been p	rovided in	Part )	KIII		Γ
Pa	rt V Endowment Funds. Complete									
		(a)Current year	(b)	Prior year				hree years back	<b>(e)</b> Fou	r years back
1a	Beginning of year balance	6,859,481		6,612	,188	6,435,54		1,061,270		843,591
b	Contributions							5,000,000		
С	Net investment earnings, gains, and losses	60,866		918	,361	793,468	3	374,275		217,679
d	Grants or scholarships									
е	Other expenditures for facilities	16,710		671	,068	616,82!	5			
_	and programs	10,710			,000		1-			
Т	Administrative expenses	6,903,637		6,859	481	6,612,188		6,435,545		1,061,270
g	End of year balance	, ,	- /1	•			1	0,433,343		1,001,270
2	Provide the estimated percentage of the cur	rent year end balance 19 000 %	e (IIn	ie 1g, co	iumn (a)) i	neid as				
a	Board designated or quasi-endowment	19 000 %								
b	Permanent endowment ► 0 %									
C	remporarily restricted endowment	000 %								
_	The percentages in lines 2a, 2b, and 2c sho									
3a	Are there endowment funds not in the posse organization by	ssion of the organiza	tion	tnat are	neid and a	aministere	a for	tne	Υe	es No
	(i) unrelated organizations							3a(	-	No
	(ii) related organizations							3a(	ii)	No
b	If "Yes" to 3a(II), are the related organization	•						31	<u> </u>	
4	Describe in Part XIII the intended uses of the									
Par	t VI Land, Buildings, and Equipme 11a. See Form 990, Part X, line		ne o	rganıza	ition ansv	vered Yes	s' to	Form 990, Pa	irt IV,	line
	Description of property	10.			ost or other (investment)	(b)Cost or basis (ot		(c) Accumulate depreciation	ed (d	) Book value
	Land			+						
	Buildings		_							
	Leasehold improvements								+	
	Equipment					13	8,872	88,	727	50,145
	Other					<u> </u>	-,-,-	50,		33,113
	I. Add lines 1a through 1e (Column (d) must e			ımn (B),	line 10(c).)			🕨		50,145
	<u>-</u> · · · · · ·	. ,		. ,,	. , ,				) (Forn	1990) 2014

Part VII Investments—Other Securities. Co	mplete if the organizatio	n answered 'Yes' to Form 990, Part IV, line 11b.
See Form 990, Part X, line 12.  (a) Description of security or category	(b)Book value	(c) Method of valuation
(including name of security)		Cost or end-of-year market value
(1)Financial derivatives		
(2)Closely-held equity interests Other		
Total. (Column (b) must equal Form 990, Part X, col (B) line 12)	•	
Part VIII Investments—Program Related. C	Complete if the organizati	on answered 'Yes' to Form 990, Part IV, line 11c
See Form 990, Part X, line 13.  (a) Description of investment	(b) Book value	(c) Method of valuation
(a) Description of investment	(b) Book value	Cost or end-of-year market value
Total. (Column (b) must equal Form 990, Part X, col (B) line 13)	<b>F</b>	
		90, Part IV, line 11d See Form 990, Part X, line 15
(a) Desc	ription	(b) Book value
Total. (Column (b) must equal Form 990, Part X, col.(B) line	15)	
Part X Other Liabilities. Complete if the org		-
Form 990, Part X, line 25.		, , ,
1 (a) Description of liability	(b) Book value	
Federal income taxes		
		7
		-
		-
		-
Total. (Column (b) must equal Form 990, Part X, col (B) line 25 )	<b>F</b>	
2 Linkship for an arrange to a position of the Doub VIII manage	do the tayt of the feet - t-	**********************************

rai		levenue per Audited Financial Statements With Revenue p wered 'Yes' to Form 990, Part IV, line 12a.	C1 10	ctarii complete ii
1		er support per audited financial statements	1	4,788,237
2	Amounts included on line 1 bi	ut not on Form 990, Part VIII, line 12		
а	Net unrealized gains (losses)	on investments   <b>2a</b>   -282,971		
b	Donated services and use of f	acılıtıes 2b		
c	Recoveries of prior year grant	s		
d	Other (Describe in Part XIII )			
e	Add lines <b>2a</b> through <b>2d</b>		2e	-282,971
3	_		3	5,071,208
4	Amounts included on Form 99	0, Part VIII, line 12, but not on line 1		, ,
а		luded on Form 990, Part VIII, line 7b . 4a 38,707		
ь	•			
С			4c	38,707
5		d <b>4c.</b> (This must equal Form 990, Part I, line 12)	5	5,109,915
		xpenses per Audited Financial Statements With Expenses	per	
		swered 'Yes' to Form 990, Part IV, line 12a.	<u> </u>	<u>'</u>
1	Total expenses and losses pe	r audited financial statements	1	4,456,646
2	A mounts included on line 1 bu	it not on Form 990, Part IX, line 25		
а	Donated services and use of f	acılıtıes		
b	Prior year adjustments	2b		
c	Otherlosses			
d	Other (Describe in Part XIII )	2d		
e	Add lines 2a through 2d	· · · · · · · · · · · · · · · · · · ·	2e	0
3	Subtract line ${f 2e}$ from line ${f 1}$ .		3	4,456,646
4	Amounts included on Form 99	0, Part IX, line 25, but not on line 1:		
a	Investment expenses not incl	uded on Form 990, Part VIII, line 7b   <b>4a</b>   38,707		
b	Other (Describe in Part XIII )	4b		
c	Add lines 4a and 4b		4c	38,707
5	Total expenses Add lines 3 a	nd <b>4c.</b> (This must equal Form 990, Part I, line 18)	5	4,495,353
Par	Supplemental In	formation		
Part		Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, lines 2d and 4b, and Part XII, lines 2d and 4b.		de any addıtıonal
	Return Reference	Explanation		
DADT	V, LINE 4	THE SCHOTT FOUNDATION ENDOWMENT WAS CREATED TO PROVI	DELC	NG-TERM
FANI	V, LINE 4	FINANCIAL SUPPORT FOR THE SCHOTT FOUNDATION ACCORDING MANAGED WITH DISCIPLINED LONGER-TERM INVESTMENT OBJECT DESIGNED TO MEET CASH FLOWS AND SPENDING REQUIREMENTS ASSETS IS DESIGNED TO ATTAIN THE MAXIMUM TOTAL RETURN C ACCEPTABLE AND AGREED UPON LEVELS OF RISK IT IS THE GOAL LONG-TERM INVESTMENTS TO GENERATE AN AVERAGE TOTAL AN EXCEEDS THE SPENDING/PAYOUT RATE PLUS INFLATION	GLY, T TIVES MAN ONSI OF T	HESE FUNDS ARE S AND STRATEGIES AGEMENT OF THE STENT WITH HE AGGREGATE
PART	X, LINE 2	THE FOUNDATION ACCOUNTS FOR THE EFFECT OF ANY UNCERTAING ON A "MORE LIKELY THAN NOT" THRESHOLD TO THE RECOGNITION BEING SUSTAINED BASED ON THE TECHNICAL MERITS OF THE POSE BY THE APPLICABLE TAXING AUTHORITY IF A TAX POSITION OR TO RESULT IN UNCERTAINTIES OF THOSE POSITIONS, THE UNRECESTIMATED BASED ON A "CUMULATIVE PROBABILITY ASSESSMENTHE ESTIMATED TAX LIABILITY FOR ALL UNCERTAIN TAX POSITION HAS IDENTIFIED ITS TAX STATUS AS A TAX-EXEMPT ENTITY AND INCLASSIFY REVENUES AS EXEMPT AS ITS ONLY SIGNIFICANT TAX POSITIONS UNCERTAINTY REQUIRING RECOGNITION THE FOUNDATION IS NUCERTAINTY REQUIRING RECOGNITION THE FOUNDATION IS NUCERTAINTY REQUIRING RECOGNITION THE FOUNDATION IS NOT THE POWER OF THE POWN AND TAXING JURISDICTION ITS FEDERAL AND SET IN THE POWER OF THE POWE	N OF SITIO OSIT OGNI T" TH ONS T ITS DO OSIT DO NO	THE TAX POSITIONS N UNDER SCRUTINY TONS ARE DEEMED IZED TAX BENEFIT IS AT AGGREGATES THE FOUNDATION ECISIONS TO IONS HOWEVER, OT RESULT IN AN JRRENTLY UNDER

Jenedale 2 (1 31111 33 3) 23 13		i age <b>S</b>
Part XIII Supplemental Information	on (continued)	
Return Reference	Explanation	
l		
-		

Schedule D (Form 990) 2014

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DLN: 93493132025796

OMB No 1545-0047

Schedule I (Form 990)

**Grants and Other Assistance to Organizations,** Governments and Individuals in the United States

Department of the Treasury Internal Revenue Service

Complete if the organization answered "Yes," to Form 990, Part IV, line 21 or 22. Attach to Form 990.

Open to Public **Inspection** 

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Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990. Employer identification number Name of the organization THE SCHOTT FDTN FOR PUBLIC EDUCATION 04-3457065

Ι	General Information on Grants and Assistance
oes t	the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and

#### Part I **General Information on Grants and Assistance**

the selection criteria used to award the grants or assistance? . . . . . . . . . . . . . . . . . . Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Yes	

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	( <b>d)</b> A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
See Additional Data Table							

2 Enter total number of section $501(c)(3)$ and government organizations listed in the line 1 table	
---	--

Enter total number of other organizations listed in the line 1 table.

34

Part III Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" to Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

(a)Type of grant or assistance	<b>(b)</b> Number of recipients	<b>(c)</b> A mount of cash grant	(d)A mount of non-cash assistance	(e)Method of valuation (book, FMV, appraisal, other)	(f)Description of non-cash assistance

Part IV Suppleme	ental Information. Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.
Return Reference	Explanation
PART I, LINE 2	THE ORGANIZATION ADHERES TO A STRICT POLICY FOR MONITORING THE USE OF GRANT FUNDS IN THE UNITED STATES BY (1) ENABLING IT TO RETAIN CONTROL AND DISCRETION AS TO THE USE OF THE FUNDS, (2) MAINTAINING RECORDS THAT ESTABLISH THAT THE FUNDS WERE USED FOR EXEMPT PURPOSES, AND (3) LIMITING THE DISTRIBUTION OF FUNDS TO SPECIFIC PROJECTS THAT ARE IN FURTHERANCE OF ITS OWN EXEMPT PURPOSE IN ADDITION, EACH POTENTIAL GRANTEE MUST SUBMIT A GRANT PROPOSAL TO THE ORGANIZATION WHICH OUTLINES THE GRANT AMOUNT REQUESTED AND THE PURPOSE OF THE GRANT THE ORGANIZATION WILL THEN CONDUCT A PRE-GRANT INQUIRY WHICH ADDRESSES THE FOLLOWING (1) THE IDENTITY, PRIOR HISTORY, AND EXPERIENCE OF THE GRANTEE ORGANIZATION AND ITS MANAGERS, (2) WHETHER THE GRANTEE HAS A HISTORY OF COMPLIANCE WITH THE TERMS OF PREVIOUS GRANTS, (3) THE CURRENT PROJECT, AND THE CONNECTION TO THE ORGANIZATION'S MISSION AFTER THE GRANT HAS BEEN APPROVED, A GRANT AWARD LETTER IS SENT TO THE GRANTEE DISCUSSING THE TERMS OF THE GRANT THIS LETTER REQUIRES THE GRANTEE TO FURNISH THE GRANTOR WITH A REPORT ON THE USE OF THE FUNDS AND THE PROGRESS MADE IN ACCOMPLISHING THE PURPOSE OF THE GRANT

#### **Additional Data**

Software ID:

**Software Version:** 

**EIN:** 04-3457065

Name: THE SCHOTT FDTN FOR PUBLIC EDUCATION

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	<b>(b)</b> EIN	(c) IRC Code section if applicable	( <b>d)</b> A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ALLIANCE FOR QUALITY EDUCATION94 CENTRAL AVENUE ALBANY,NY 12206	22-3810450	501(C)(4)	85,000				SUPPORT THE OPPORTUNITY TO LEARN CAMPAIGN
AMERICAN FEDERATION OF TEACHERS EDUCATIONAL FOUNDATION555 NEW JERSEY AVENUE NW WASHINGTON, DC 20001	52-1439116	501(C)(3)	80,000				NATIONAL OCT 2013 OTL SUMMIT & CONFON EDUC AND SOCIAL JUSTICE
ARKANSAS ADVOCATES FOR CHILDREN AND FAMILIESUNION STATION SUITE 306 1400 W MARKHAM LITTLE ROCK, AR 72201	71-0492205	501(C)(3)	30,000				DEVELOP THE OTL CAMPAIGN IN ARKANSAS COMMUNICATIONS, POLICY ADVOCACY & NETWORK

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.								
(a) Name and address of organization or government	<b>(b)</b> EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance	
ARKANSAS PUBLIC POLICY PANEL1308 WEST 2ND STREET LITTLE ROCK, AR 72201	71-0467088	501(C)(3)	70,000				DEVELOP THE OTL CAMAPIGN IN ARKANSAS COMMUNICATIONS, POLICY ADVOCACY & NETWORK	
ASSOCIATION OF BLACK FOUNDATION EXECUTIVES333 7TH AVENUE 13TH FLOOR NEW YORK, NY 10001	23-7156531	501(C)(3)	5,000				MEMBERSHIP RENEWAL	
CALIFORNIANS FOR JUSTICE EDUCATION FUND INC520 3RD STREET SUITE 209 OAKLAND,CA 94607	94-3256009	501(C)(3)	25,000				COMMUNICATION VIDEO ON FAIR FUNDING FOR PUBLIC SCHOOLS	

<u>Form 990,Schedule I, Par</u>	Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.								
(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	<b>(f)</b> Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance		
CENTER FOR LABOR EDUCATION AND RESEARCH INC3353 WASHINGTON STREET BOSTON,MA 02130	22-2604923	501(C)(3)	42,000				SUPPORT MA JWJ'S ORGANIZING EFFORT EDUCATION FOR OTL CAMPAIGN IN MA		
CENTER FOR POPULAR DEMOCRACY INC449 TROUTMAN STREET BROOKLYN,NY 11237	45-3813436	501(C)(3)	20,000				PROMOTE FAIR FUNDING FOR PA STATE & NETWORK BUILDING		
CENTER FOR POPULAR DEMOCRACY INC449 TROUTMAN STREET BROOKLYN,NY 11237	45-3813436	501(C)(3)	50,000				NETWORKING OTL GRANT FOR THE ALLIANCE TO RECLAIM OUR SCHOOLS		

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.								
(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance	
CENTER FOR SOCIAL INCLUSION150 BROADWAY SUITE 303 NEW YORK, NY 10038	90-0686577	501(C)(3)	15,000				OTL GRANT FOR STEPPING UP FILM PROJECT	
COMMUNITY ASSET DEVELOPMENT REDEFINING EDUCATION 8510 1/2 SOUTH BROADWAY LOS ANGELES, CA 90003	26-4753821	501(C)(3)	7,500				BOARD DISCRETIONARY GRANTS	
COMMUNITY COALITION FOR SUBSTANCE ABUSE PREVENTION & TREAT 8101 S VERMONT AVENUE LOS ANGELES, CA 90044	95-4298811	501(C)(3)	25,000				VIDEO PRODUCTION/ HEALTHY LEARNING AND LIVING DISTRICTS CAMPAIGN	

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.									
(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance		
COMMUNITY FUNDS INC 909 THIRD AVENUE 22ND FLOOR NEWYORK,NY 10022	13-3062214	501(C)(3)	180,000				SUPPORT DONORS' EDUCATION COLLABORATIVE		
ECONOMIC POLICY INSTITUTE1333 H STREET NW EAST TOWER WASHINGTON,DC 20005	52-1368964	501(C)(3)	20,000				BROADER BOLDER APPROACH TO EDUCATE		
GAMALIEL FOUNDATION 221 N LASALLE STREET SUITE 1320 CHICAGO,IL 60601	36-2657863	501(C)(3)	50,000				DEVELOP THE CONCEPT OF STUDENT RECOVERY PLANS FOR OTL CAMPAIGN		

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.										
(a) Name and address of organization or government	<b>(b)</b> EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	( <b>h)</b> Purpose of grant or assistance			
GIRLS FOR GENDER EQUITY30 THIRD AVENUE SUITE 104 BROOKLYN,NY 11217	04-3697166	501(C)(3)	60,000				SUPPORT GIRLS EQUITY INITIATIVE AS PART OF OTL IN NY & BOARD DISCRETIONARY GRANT			
INSTITUTE FOR AMERICA'S FUTURE1825 K STREET NW SUITE 400 WASHINGTON,DC 20006	52-1971942	501(C)(3)	40,000				RESEARCH AND EDUCATION FOR OTL CAMPAIGN MESSAGING			
KENWOOD OAKLAND COMMUNITY ORGANIZATION4242 S COTTAGE GROVE CHICAGO,IL 60653	36-2598637	501(C)(3)	5,000				JOURNEY FOR JUSTICE ALLIANCE/CONFERENCE SCHOLARSHIP FOR SOUTHERN PARTICIPANTS			

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.									
(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	<b>(f)</b> Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance		
KENWOOD OAKLAND COMMUNITY ORGANIZATION4242 S COTTAGE GROVE CHICAGO,IL 60653	36-2598637	501(C)(3)	30,000				NATIONAL ORGANIZING NETWORK TO PROMOTE COMMUNITY-DRIVEN SCHOOLS TRANSFORMATION		
MASSACHUSETTS BUDGET & POLICY CENTER15 COURT SQUARE SUITE 700 BOSTON,MA 02108	04-2967537	501(C)(3)	25,000				RESEARCH & ANALYSIS OF BUDGET AND TAX POLICIES IN MA		
NATIONAL COUNCIL ON CRIME AND DELINQUENCY 1970 BROADWAY SUITE 500 OAKLAND,CA 94612	13-1624111	501(C)(3)	50,000				SUPPORT COMMUNICATION & POLICY ADVOCACY FOR GENDER JUSTICE CAMPAIGN		

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.									
(a) Name and address of organization or government	<b>(b)</b> EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance		
NATIONAL ECONOMIC & SOCIAL RIGHTS INITIATIVE90 JOHN STREET SUITE 308 NEW YORK, NY 10038	73-1714118	501(C)(3)	100,000				DIGNITY IN SCHOOL/ SOLUTIONS NOT SUSPENSIONS NATIONALLY		
NETWORK FOR PUBLIC EDUCATIONPO BOX 44200 TUCSON, AZ 85733	35-2532243	501(C)(4)	10,000				NETWORKING GRANT TO SUPPORT NPE NATIONAL CONFERENCE		
NORTH STAR FUND520 8TH AVENUE SUITE 2203 NEW YORK, NY 10018	13-2950801	501(C)(3)	25,000				BUILDING A PUBLIC WILL FOR HEALTHY LIVING AND LEARNING COMMUNITIES		

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.									
(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance		
ONE VOICE MISSISSIPPI 1072 W LYNCH STREET JACKSON,MS 39203	02-0787550	501(C)(3)	70,000				OTL MESSAGING WORK IN MS & LA		
PENNSYLVANIA IMMIGRATION AND CITIZENSHIP COALITION 2100 ARCH STREET 4TH FLOOR PHILADELPHIA,PA 19103	83-0379943	501(C)(3)	20,000				PA CAMPAIGN FAIR FUNDING FOR THE STATE'S PUBLIC EDUCATION SYSTEM		
PUBLIC INTEREST PROJECTS45 W 36TH STREET 6TH FLOOR NEW YORK, NY 10018	13-3191113	501(C)(3)	34,000				SUPPORT GRASSROOTS COMMUNITY OTL NATIONWIDE EFFORTS		

Form 990,Schedule I, Pa	<u>rt II, Grants ar</u>	id Other Assistance	e to Domestic Org	<u>,anizations and Do</u>	<u>mestic Governme</u>	nts.	
(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
RACE FORWARD32 BROADWAY SUITE 1801 NEW YORK, NY 10004	94-2759879	501(C)(3)	50,000				TRAINING AND MESSAGING WORK IN SUPPORT OTL CAMPAIGN
RURAL COMMUNITY ALLIANCE633 HIGHWAY 9 FOX,AR 72051	25-1917387	501(C)(3)	45,000				SUPPORT OTL CAMPAIGN IN ARKANSAS
SOUTHERN EDUCATION FOUNDATION INC135 AUBURN AVE NE 2ND FLOOR ATLANTA,GA 30303	13-5562388	501(C)(3)	12,000				CONVENING FOR A STRATEGY TO ADVANCE EQUITY & OPPORTUNITY IN THE SOUTH

Form 990,Schedule I, Par	rt II, Grants an	<u>d Other Assistance</u>	to Domestic Org	anizations and Do	mestic Governmer	กts.	
(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
THE REGENTS OF THE UNIVERSITY OF CALIFORNIACENTER FOR POLICING EQUALITY LOS ANGELES, CA 90095	95-6006143	501(C)(3)	795,000				SUPPORT RESEARCH TO END ZERO- TOLERANCE POLICIES
THE URBAN LEAGUE OF PHILADELPHIA121 S BROAD STREET 9TH FLOOR PHILADELPHIA, PA 19107	23-1429810	501(C)(3)	20,000				PA CAMPAIGN FOR FAIR EDUCATION FUNDING
TIDES FOUNDATIONPO BOX 29903 SAN FRANCISCO,CA 94129	51-0198509	501(C)(3)	10,000				PA CAMPAIGN FOR FAIR EDUCATION FUNDING

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.										
(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance			
YOUTHBUILD USA58 DAY STREET SOMERVILLE,MA 02144	22-3076454	501(C)(3)	41,200				SUPPORT YOUNG'S YOUTH ORGANIZING EFFORTS IN BOSTON + CONFERENCE TRAVEL SUPPORT			
THE NEW PRESS INC120 WALL STREET FL 31 NEW YORK, NY 10005	13-3584516	501(C)(3)	5,000				BOARD DISCRETIONARY GRANT			
XAVIER UNIVERSITY OF LOUISIANAOFFICE OF ALUMNI RELATIONS 1 DREXEL DRIVE BOX 66 NEW ORLEANS, LA 70125	72-0635884	501(C)(3)	5,000				BOARD DISCRETIONARY GRANT			

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#### DLN: 93493132025796

### OMB No 1545-0047

(Form 990)

Department of the Treasury

Internal Revenue Service

Schedule J

For certain Officers, Directors, Trustees, Key Employees, and Highest **Compensated Employees** 

**Compensation Information** 

► Complete if the organization answered "Yes" to Form 990, Part IV, line 23. ► Attach to Form 990. ▶ Information about Schedule J (Form 990) and its instructions is at www.irs.gov/form990.

Open to Public Inspection

Name of the organization THE SCHOTT FDTN FOR PUBLIC EDUCATION **Employer identification number** 

04-3457065

Pa	rt I Questions Regarding Compensation					
					Yes	No
1a	Check the appropriate box(es) if the organization prov 990, Part VII, Section A, line 1a Complete Part III					
	First-class or charter travel	$\Gamma$	Housing allowance or residence for personal use			
	Travel for companions	Γ	Payments for business use of personal residence			
	Tax idemnification and gross-up payments	<b>▽</b>	Health or social club dues or initiation fees			
	Discretionary spending account	Г	Personal services (e g , maid, chauffeur, chef)			
b	If any of the boxes in line 1a are checked, did the org			1b	Yes	
2	Did the organization require substantiation prior to re directors, trustees, officers, including the CEO/Exec			2	Yes	
			, <b>g</b>		165	
3	Indicate which, if any, of the following the filing organ organization's CEO/Executive Director Check all the used by a related organization to establish compensation	at apply	y Do not check any boxes for methods			
	∇ Compensation committee	~	Written employment contract			
			Compensation survey or study			
	Form 990 of other organizations	<u>                                      </u>	Approval by the board or compensation committee			
4	During the year, did any person listed in Form 990, P or a related organization	art VII	, Section A , line 1a with respect to the filing organization			
а	Receive a severance payment or change-of-control p	aymen	t?	4a		No
b	Participate in, or receive payment from, a supplemen	tal non	qualified retirement plan?	4b		Νo
C	Participate in, or receive payment from, an equity-ba	sed co	mpensation arrangement?	<b>4</b> c		Νo
	If "Yes" to any of lines 4a-c, list the persons and pro	vıde th	e applicable amounts for each item in Part III			
	Only 501(c)(3), 501(c)(4), and 501(c)(29) organizati	ions mı	ıst complete lines 5-9.			
5	For persons listed in Form 990, Part VII, Section A, compensation contingent on the revenues of					
а	The organization?			5a		Νo
	Any related organization?			5b		No
	If "Yes," to line 5a or 5b, describe in Part III					
6	For persons listed in Form 990, Part VII, Section A, compensation contingent on the net earnings of	lıne 1a	, did the organization pay or accrue any			
а	The organization?			6a		Νo
b	Any related organization?			6b		Νo
	If "Yes," to line 6a or 6b, describe in Part III					
7	For persons listed in Form 990, Part VII, Section A, payments not described in lines 5 and 6? If "Yes," de			7	Yes	
8	Were any amounts reported in Form 990, Part VII, pa	aid or a	ccured pursuant to a contract that was			
	subject to the initial contract exception described in					
	ın Part III			8		Νo
9	If "Yes" to line 8, did the organization also follow the section 53 $4958-6(c)$ ?	rebutta	able presumption procedure described in Regulations	9		

### Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note. The sum of columns (B)(1)-(111) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual

(A) Name and Title		(B) Breakdown of	f W-2 and/or 1099-MIS	SC compensation	(C) Retirement and	1 ' '	(E) Total of columns	(F) Compensation in	
		(i) Base compensation	(ii) Bonus & ıncentive compensation	(iii) Other reportable compensation	other deferred compensation	benefits	(B)(ı)-(D)	column(B) reported as deferred in prior Form 990	
1 JOHN H JACKSON, PRESIDENT & CEO	(i)	329,232	35,000	1,500	20,800	24,926	411,458	0	
	(ii)	0	0	0	0	0	0	0	
2 CASSIE SCHWERNER, SENIOR VP OF PROGRAMS	(i) (ii)	164,986	8,000	1,500	14,000	28,984	217,470	0	
SENIOR II OI I NOONAIIS		0	0	0	0	0	0	0	

Schedule J (Form 990) 2014

#### Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II

Also complete this part for any additional information

Return Reference	Explanation
PART I, LINE 1A	ALL EMPLOYEES, INCLUDING THE PRESIDENT AND CEO ARE ELIGIBLE TO BE REIMBURSED \$75 PER MONTH FOR HEALTH CLUB MEMBERSHIP
,	JOHN JACKSON'S BONUSES ARE DECIDED BY THE EXECUTIVE COMMITTEE AND THE BOARD CASSIE SCHWERNER'S BONUS IS DECIDED BY JOHN JACKSON AND IS BASED ON EMPLOYEE PERFORMANCE AND THE BUDGET OF THE ORGANIZATION OTHER EMPLOYEES' BONUSES ARE DECIDED BY THE CEO BASED ON THEIR PERFORMANCE AND THE BUDGET OF THE ORGANIZATION

Schedule J (Form 990) 2014

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As Filed Data -

DLN: 93493132025796

2014

Open to Public Inspection

## SCHEDULE O

Department of the Treasury Internal Revenue Service

(Form 990 or 990-EZ)

# Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

► Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Name of the organization
THE SCHOTT FDTN FOR PUBLIC EDUCATION

04-3457065

#### 990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 2	GREG JOBIN-LEEDS AND MARIA JOBIN-LEEDS ARE HUSBAND AND WIFE. GREG JOBIN-LEEDS IS THE SON OF LISELOTTE J. LEEDS.
FORM 990, PART VI, SECTION B, LINE 11	THE FORM 990 IS PREPARED BY THE ORGANIZATION'S OUTSIDE ACCOUNTANTS AND IS PROVIDED TO THE BOARD VIA E-MAIL PRIOR TO BEING FILED
FORM 990, PART VI, SECTION B, LINE 12C	ANNUALLY, ALL DIRECTORS REVIEW A LIST OF CURRENT GRANTEES AND VENDOR SIGNIFICANT PARTNERS  AND DECLARE ANY CONFLICTS OR POTENTIAL CONFLICTS THE CONFLICT OF INTEREST POLICY IS DISTR IBUTED ANNUALLY ALL OFFICERS AND DIRECTORS ARE REQUIRED TO SIGN AN ANNUAL ACKNOWLEDGEMENT  THAT THEY HAVE RECEIVED A COPY OF THE POLICY, UNDERSTAND IT, AND AGREE TO ABIDE BY ITS TE RMS
FORM 990, PART VI, SECTION B, LINE 15	THE PROCESS OF DETERMINING INITIAL COMPENSATION OF THE ORGANIZATIONS CHIEF EXECUTIVE OFFIC ER AND OTHER OFFICERS AND KEY EMPLOYEES INCLUDES A REVIEW BY AN OUTSIDE SEARCH FIRM A SET OF PARAMETERS INCLUDING SALARY AND JOB DESCRIPTION GUIDELINES IS CONVEYED TO THE RECRUITM  ENT FIRM THE RECRUITMENT FIRM WILL SEEK OUT INDIVIDUALS WITH THE APPROPRIATE BACKGROUND A ND ALSO MAKE RECOMMENDATIONS AS TO THE COMPARABLE SALARIES FOR SIMILAR POSITIONS THE BASI S OF THE COMPENSATION DECISION IS DOCUMENTED AND BASED ON A DETERMINATION THAT THE AMOUNT PAID IS NO MORE THAN REASONABLE IN VIEW OF SERVICES RENDERED THE EXECUTIVE COMMITTEE MANA GES THIS PROCESS AND MAKES A RECOMMENDATION TO THE FULL BOARD
FORM 990, PART VI, SECTION C, LINE 19	THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST AN INTERESTED PARTY MAY MAKE A REQUEST DI RECTLY TO THE ORGANIZATION ADDITIONALLY, THE FORM 990 AND AUDITED FINANCIAL STATEMENTS AR E AVAILABLE VIA THE MASSACHUSETTS ATTORNEY GENERAL'S WEBSITE

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# SCHEDULE R (Form 990)

**Related Organizations and Unrelated Partnerships** 

2014

Open to Public Inspection

OMB No 1545-0047

Department of the Treasury
Internal Revenue Service

► Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

► Attach to Form 990.

▶ Information about Schedule R (Form 990) and its instructions is at <a href="www.irs.gov/form990">www.irs.gov/form990</a>.

Name of the organization THE SCHOTT FDTN FOR PUBLIC EDUCATION	Employer identification number
	04-3457065

Part I Identification of Disregarded Entities Complete if the organization answered "Yes" on Form 990, Part IV, line 33.											
(a) Name, address, and EIN (if applicable) of disregarded entity	<b>(b)</b> Primary activity	(c) Legal domicile (state or foreign country)	<b>(d)</b> Total income	<b>(e)</b> End-of-year assets	<b>(f)</b> Direct controlling entity						
						_					

Part II Identification of Related Tax-Exempt Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity		512(b) ntrolled
						Yes	No
(1) CAROLINE & SIGMUND SCHOTT FUND 675 MASSACHUSETTS AVENUE 8TH FL  CAMBRIDGE, MA 02139 11-2856561	PRIVATE GRANTMAKING FOUNDATION	DE	501(C)(3)	PF	N/A	Yes	
(2) THE OPPORTUNITY TO LEARN ACTION FUND 675 MASSACHUSETTS AVENUE 8TH FL  CAMBRIDGE, MA 02139 27-4836929	ADVOCACY ORGANIZATION - EDUCATIONAL	DC	501(C)(4)	N/A	N/A	Yes	

Part III	Identification of Related Organizations Taxable as a Partnership Complete if the organization answered "Yes" on Form 990, Part I	(V, line 34
	because it had one or more related organizations treated as a partnership during the tax year.	

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	)	(i)	(j)	)	(k)
Name, address, and EIN of	Primary activity		Direct	Predominant	Share of	Share of	Disprop	rtionate	Code V-UBI	Gener	al or	Percentage
related organization		domicile	controlling	ıncome(related,	total income	end-of-year	allocati	ions?	amount in box	mana	ging	ownership
		(state or	entity	unrelated,		assets			20 of	partn	ier?	
		foreign		excluded from					Schedule K-1			
		country)		tax under					(Form 1065)			
				sections 512-								
				514)								
				,			Yes	No		Yes	No	
			l									

Part IV Identification of Related Organizations Taxable as a Corporation or Trust Complete of the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	
Name, address, and EIN of	Primary activity	Legal	Direct controlling	Type of entity	Share of total	Share of end-	Percentage	Section 512	
related organization	1	domicile	entity	(C corp, S	ıncome	of-year	ownership	(b)(13)	
	1	(state or foreign		corp,		assets	1	controlled	
	1	country)		or trust)			1	entity?	
								Yes	No
							<i>'</i>		_

**s** Other transfer of cash or property from related organization(s)

ned	ule R (Form 990) 2014		P	age <b>3</b>
ar	Transactions With Related Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.			
	Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule		Yes	No
Du	ring the tax year, did the orgranization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?			
a	Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity	1a		No
b	Gift, grant, or capital contribution to related organization(s)	1b		No
c	Gift, grant, or capital contribution from related organization(s)	1c	Yes	1
d	Loans or loan guarantees to or for related organization(s)	1d		No
e	Loans or loan guarantees by related organization(s)	<b>1</b> e		No
f	Dividends from related organization(s)	1f		No
g	Sale of assets to related organization(s)	<b>1</b> g		No
h	Purchase of assets from related organization(s)	1h		No
i I	Exchange of assets with related organization(s)	1i		No
j	Lease of facilities, equipment, or other assets to related organization(s)	<b>1</b> j		No
		_		<u> </u>
k	Lease of facilities, equipment, or other assets from related organization(s)	1k		No
I	Performance of services or membership or fundraising solicitations for related organization(s)	11	Yes	
m l	Performance of services or membership or fundraising solicitations by related organization(s)	1m		No
n S	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n	Yes	
0	Sharing of paid employees with related organization(s)	10	Yes	╀
			_	<del> </del> _
•	Reimbursement paid to related organization(s) for expenses	1p	+	No
q	Reimbursement paid by related organization(s) for expenses	1q	Yes	+
r	Other transfer of cash or property to related organization(s)	1r		No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of related organization	<b>(b)</b> Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) CAROLINE & SIGMUND SCHOTT FUND	С	1,060,000	CASH
(2) CAROLINE & SIGMUND SCHOTT FUND	L	20,000	CASH
(3) OPPORTUNITY TO LEARN ACTION FUND	N	4,569	CASH
(4) OPPORTUNITY TO LEARN ACTION FUND	0	114,933	CASH
(5) OPPORTUNITY TO LEARN ACTION FUND	Q	13,225	CASH

No

Part VI Unrelated Organizations Taxable as a Partnership Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships

I														
(a) Name, address, and EIN of entity	<b>(b)</b> Primary activity	domicile (state or foreign country)	ıncome sı (related, 50 unrelated, orgal excluded from tax under		(e) all partners section o1(c)(3) inizations?	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership	
1	1 '	1	sections 512-	1	ı	1 '	1	(	J	1 '	1	J	1	
	<u> </u>	<u> </u>	514)	Yes N	No	<u> </u>		Yes	No		Yes	No		
			,			'	<u> </u>		$rac{1}{2}$					

Schedule R (Form 990) 2014 Page **5** 

### Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R (see instructions)

Return Reference Explanation

Schedule R (Form 990) 2014